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Apelon Distributed Terminology System (DTS)

DTS Workflow Manager User Guide

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DTS Workflow Overview For Workflow Managers

DTS Workflow is a tool for creating and designating assignments related to reviewing and editing concepts/terms using the DTS Editor. DTS Workflow is enabled through installation of two DTS Workflow plugins, **DTS Workflow Server** and **DTS Workflow Client**.

The **Workflow Manager** creates assignments that consist of concepts and/or terms for review and possible edit. The Manager then designates a Modeler to review each assignment (another Manager also may be designated to review and edit the assignment concepts). Only those assignments assigned to a Modeler by the Manager appear in the Modeler's assignment view.

The Modeler can accept the tasks of reviewing and editing the concepts/terms in an assignment. The Modeler uses the standard DTS Editor create, edit, and delete functions to make necessary concept/term modifications.

Assignment edits to non-editable (e.g., subscription) namespaces are written to the local namespace selected by the Modeler. The namespace is updated with the Modeler edits as soon as the Modeler saves the edits.

The Modeler then can mark the assignment as **COMPLETED** (even if no action was taken for some of the concepts/terms in the assignment) or **INCOMPLETE**. The Manager can view completed assignments, and view the edits performed by the Modeler in detail. The Manager then can decide if any portion of the completed assignment requires further attention by either a Modeler or a Manager.

Note: Because assignment edits are immediate (upon save) you should set up a DTS Server for content editing that is separate from the one you use for production. After you complete a body of work using DTS Workflow, you can publish local namespace content using the DTS publishing utility, then load it onto your production DTS Server.

Install and Set Up DTS Workflow

The procedures discussed in the *DTS Workflow Manager Users Guide* assume that you have installed Apelon DTS (including the DTS Editor component) along with the **DTS Workflow plugins, DTS Workflow Server** and **DTS Workflow Client**. (Note that the servers (DTS Server and Workflow Server) and clients (DTS Editor and Workflow Client) may be installed on different machines.) Without the installed plugins, you cannot use the DTS Workflow features in the DTS Editor or the User Manager.

Install DTS Workflow Plugins

The **DTS Workflow Server** module installs the configuration and batch files required to create the **DTSWF schema**, and updates the User Manager to assign Workflow **Manager** and **Modeler** roles. When the **DTS Workflow Client** module is installed, the data entry and administration panels required to create and maintain work assignments are added to the available DTS Editor functions.

1. Download and save the current version of **Apelon DTS Workflow Server** to a local drive on your *Windows* PC where the DTS Server Administration component has been installed.
2. Click the **DTS Workflow Server** link to run the **InstallShield** wizard, which guides you through the installation process; when the *Install Complete* window displays, click **Finish**.
3. Download and save the current version of **Apelon DTS Workflow Client** to a local drive on your *Windows* PC where the DTS Editor component has been installed.
4. Click the **DTS Workflow Client** link to run the **InstallShield** wizard, which guides you through the installation process; when the *Install Complete* window displays, click **Finish**.

Assignment Query Server and Version Query Server

Before you can use DTS Workflow, you must **uncomment** out both the **Assignment Query Server** and the **Version Query Server** located near the end of the **apelonserviceprops.xml** file (**DTS 3.4\bin\server**) on the DTS Server machine. These servers retrieve data from the workflow database tables.

```
<queryserver>
  <property name="qs" value="com.apelon.dtswf.server.VersionServer" />
  <property name="maxDbConns" value="15" />
  <property name="header" value="DWF:001" />
</queryserver>

<queryserver>
  <property name="qs" value="com.apelon.dtswf.server.AssignmentServer" />
  <property name="maxDbConns" value="15" />
  <property name="header" value="DWF:002" />
</queryserver>
```

When you log into DTS Editor with Workflow, you must connect to the DTS Server using a Secure Socket Server Connection with user authentication. In the **apelonserverprops.xml** file, set the **authentication** property to **true** to permit users to log in (with password) to a secure socket connection with the Apelon DTS Server.

```
<property name="authentication" value="true"/>
```

Create DTS Workflow Schema

Follow this procedure to configure and create the DTS Workflow schema.

1. When you install Apelon DTS with the **DTS Workflow Server** plugin, a **dtswf** subdirectory is created in **DTS 3.4\bin**.

In the **dtswfkbcreate.xml** file in **DTS 3.4\bin\dtswf**, ensure that the DTS Knowledgebase connection parameters are identical to those established in the **apelonserverprops.xml** file (**DTS 3.4\bin\server**). The **dtswfkbcreate.xml** file is illustrated.

```
<?xml version="1.0" encoding="UTF-8"?>

<!DOCTYPE DBConfig SYSTEM "http://apelon.com/dtd/util/db/dbconfig.dtd">
<DBConfig>
    <!--
    #####
    # Database Connection      #
    #####
    -->
    <!-- I-Net Sprinta Driver -->
    <connection>
        <property name="direction" value="target" />
        <property name="type" value="sql2k" />
        <property name="user" value="sa" />
        <property name="pass" value="" />
        <property name="host" value="localhost" />
        <property name="databaseName" value="dts" />
        <property name="databasePort" value="1433" />
        <property name="jdbcDriver" value="com.inet.tds.TdsDriver" />
        <property name="url_template"
value="jdbc:inetdae:[HOST]:[PORT]?database=[DATABASE]" />
    </connection>

    <!-- Microsoft Driver -->
    <!--
    <connection>
        <property name="direction" value="target" />
        <property name="type" value="sql2k" />
        <property name="user" value="sa" />
        <property name="pass" value="" />
        <property name="host" value="localhost" />
        <property name="databaseName" value="dts" />
        <property name="databasePort" value="1433" />
        <property name="jdbcDriver" value="com.microsoft.jdbc.sqlserver.SQLServerDriver" />
        <property name="url_template"
value="jdbc:microsoft:sqlserver://[HOST]:[PORT];databasename=[DATABASE]" />
    </connection>
    -->
```

```

<!-- Oracle Driver -->
<!--
<connection>
  <property name="type" value="oracle" />
  <property name="user" value="dts" />
    <property name="pass" value="dts" />
    <property name="host" value="localhost" />
    <property name="databaseName" value="ORCL" />
    <property name="databasePort" value="1521" />
  <property name="jdbcDriver" value="oracle.jdbc.driver.OracleDriver" />
  <property name="url_template" value="jdbc:oracle:thin:@[HOST]:[PORT]:[DATABASE]" />
</connection>
-->
<!--
  If this knowledgebase will be primarily used as a staging database
  for creating incremental subscriptions, then provide the
  Master knowledgebase name in the property for masterKb,
  which has the latest version of vocabularies and against which
  subscription diff process will be done.
  This is needed to synchronize the global sequence with one on
  Master knowledgebase to avoid any IID collisions.
  Note:
  - Expects Master knowledgebase to exist in the same database instance
    as the staging.
  - If this value is left blank then the numerical value provided
    in kbcreate.bat switch -startSeq is used to seed the
    global sequence generator.

  Example:
  - For Oracle, its the user name (e.g dts30)
  - For SQL2000, its the databaseName (e.g dts30.dbo)
-->
  <property name="masterKb" value="" />
</DBConfig>

```

2. To create the DTS Workflow schema, run **dtswfcbcreate.bat** in **DTS 3.4\bin\dtswf**.

```

@echo off
REM
REM Process Arguments when connection params are present in properties-file:
REM -p <properties-file.xml> -c <configuration full-class name>
REM If no properties-file is specified, default configuration file used -> kbcreate.xml

REM
REM Process arguments overriding the properties file configuration variables:
REM (i.e., connection params from a separate file overrides one in the property file):
REM Usage: -c <system configuration class name> which is mandatory
REM -p <user property file name>
REM file having the properties needed to run this process
REM -skipConstraints (yes/no)
REM If yes, the process does not disable/enable constraints and drop/add indexes while updating DTS
knowledgebase
REM -t <target connection config file>
REM file with the target connection params.
REM -startSeq
REM the seed value for the global sequence number (refer documentation before assigning one)
REM -skipPause will skip every pause in the process. If the schema already exists, it will override it without
confirming.
REM -saveDTSSequences will not drop existing sequences
REM

cd ..

call runApp_cw 512 com.apelon.common.util.db.DbCreate -c com.apelon.dtswf.db.admin.DTSWFDBCreateConfig -p
dtswf/dtswfkbcreate.xml -t kb/target-connection.xml -saveDTSSequences

cd dtswf

```

target-connection.xml File

A template connection file, **target-connection.xml** (in **DTS 3.4\bin\kb**), allows you to define a custom connection based on the **target** connection parameters. To establish a target connection in the **target-connection.xml** file, the value of the **direction** property should be **target**.

```
<property name="direction" value="target" />
```

You can create multiple versions of the **target-connection.xml** files, each with its own specific name, and each reflecting a specific connection to a data source. After you establish your custom connection parameters in the **target-connection.xml** file, modify the Command Line switch parameter in **dtswfbccreate.bat** by specifying the **target-connection.xml** file name to reference the appropriate custom configuration file.

Managing DTS Users for Workflow

The type of DTS user (**Manager** or **Modeler**) who connects to the DTS Server determines which Workflow functions (**Manager** or **Modeler**) will be available in the DTS Editor. A **DTS Manager** can create, view, delete, and edit assignments in DTS Workflow. A **DTS Modeler** can view all assignments, but can perform edits only for assignments assigned to that Modeler.

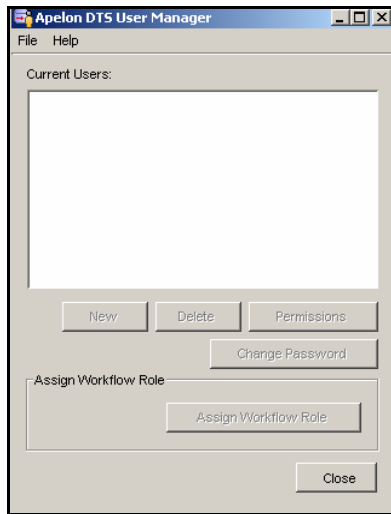
Whenever you log into DTS Editor with Workflow, you **must** connect to the DTS Server using a **Secure Socket Server Connection** with **user authentication**. This section highlights for the System Administrator how to create valid users for DTS Workflow, assign and maintain each user's edit permissions within local namespaces, and designate each DTS user as a Workflow Manager or a Modeler. A GUI-based **User Manager** tool is available from the *Windows Start* menu to perform user maintenance.

Use the Remote Server administration tool to modify user information (username and password) as necessary. Refer to the *Reset User Information* discussion in the *DTS Server Operations Guide*.

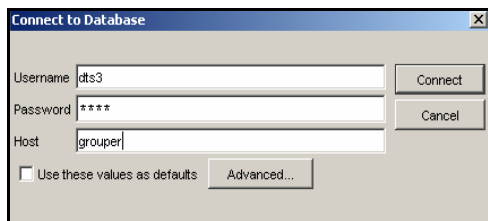
Create User/Assign Namespace Permissions

Follow this procedure to create a new DTS user, and assign user edit permissions in **local namespaces**.

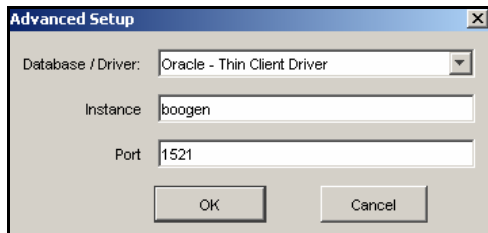
1. Select **User Manager** from the *Windows Start* menu (**Start>Programs>Apelon>DTS 3.4>User Manager**). The *Apelon DTS User Manager* window displays.



2. At this point you must connect to the DTS database. Select **Connect** from the *Apelon DTS User Manager* window **File** menu. The *Connect to Database* window displays.



3. Enter your *Username* and *Password*. Also specify a *Host* name for the machine where your database is installed. To recall these values for future sessions, click *Use these values as defaults*.
4. If your configuration requires you to modify the default Oracle instance and port designations, or to choose SQL Server, click on **Advanced**. The *Advanced Setup* window displays.

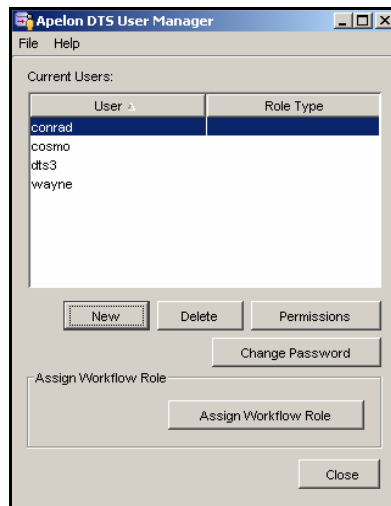


If you choose **Oracle – Thin Client Driver** in the *Database/Driver* field, you can accept the default database name in the *Database name/instance* field, and the default port number in the *Port* field, or override the defaults to connect to the desired database. Click **OK**.

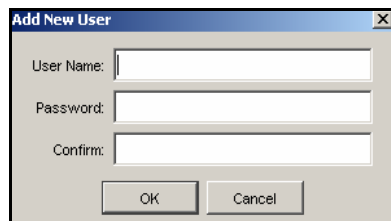
- If you indicated during DTS installation that you maintain your DTS knowledgebase in a *Microsoft SQL 2000 Server* database, and you have obtained and installed the **I-netSPRINTA** driver, then **SQL Server – Sprinta Driver** is included as an option in the *Database/Driver* field.
- If you indicated during DTS installation that you maintain your DTS knowledgebase in a *Microsoft SQL 2000 Server* database, and selected the Microsoft driver that is provided with DTS, then **SQL Server – Microsoft** is included as an option in the *Database/Driver* field.

In the displayed *Database/Driver* field, specify your SQL Server/driver selection. In the displayed *Instance* field, specify the SQL Server named instance (if you are using a default instance, leave the field blank).

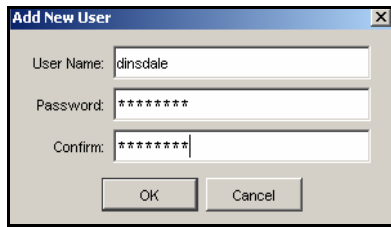
5. Click **Connect** on the *Connect to Database* window. The *Apelon DTS User Manager* window displays again, with **Current Users** listed.



6. Click **New**. The *Add New User* window displays.



7. Specify the *User Name* and *Password* for the new user (the password displays as asterisks). Retype the new password in the *Confirm* field (the password displays again as asterisks).



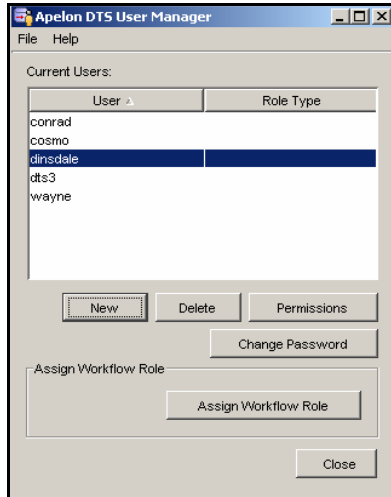
Add New User

User Name:

Password:

Confirm:

8. Click **OK**. The *User Manager* window displays again, listing the new user.



Apelon DTS User Manager

File Help

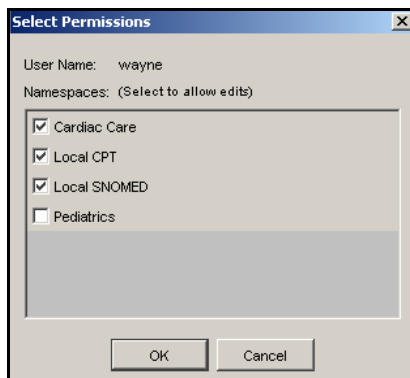
Current Users:

User	Role Type
conrad	
cosmo	
dinsdale	
dts3	
wayne	

Assign Workflow Role

9. At this point you can assign local namespace edit permissions for the new user, and/or edit permissions for an existing user. If a Modeler makes edits to a non-writable (i.e., subscription) namespace as a result of an assignment, those edits are written to the local namespace the Modeler selects in the DTS Editor. Highlight a username listed under **Current Users** on the *Apelon DTS User Manager* window, then click **Permissions**.

The *Select Permissions* window displays. The username you selected is listed, as well as the local namespaces in your DTS Knowledgebase for which edit permissions can be assigned.



Select Permissions

User Name: wayne

Namespaces: (Select to allow edits)

☒ Cardiac Care

☒ Local CPT

☒ Local SNOMED

☐ Pediatrics

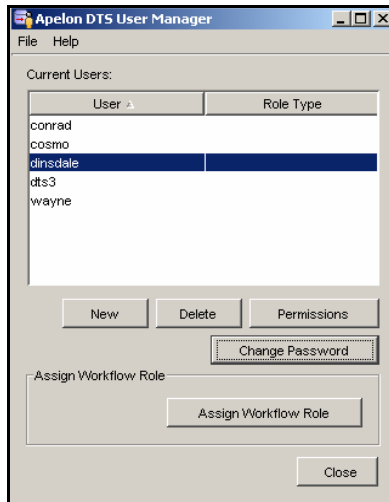
On this window you can select the **local namespace(s)** in the DTS Knowledgebase for which the user will have edit capability.

10. For the new or existing user, click each checkbox representing the local namespace for which the user will have edit permission. To remove namespace edit permission for a user, click the checkbox adjacent to the listed namespace to remove the check mark.
11. Click **OK** to create or update the user's edit permissions in the selected local namespaces. Click **Cancel** to ignore the new or updated permissions.
12. Click **Close** to exit the *Apelon DTS User Manager* window.

Change User Password

Follow this procedure to modify the password for an existing DTS user.

1. To change an existing user's password, highlight the username on the *Apelon DTS User Manager* window.



2. Click **Change Password**. The *Change Password* window displays.



3. Enter the *New Password* for the user (the password displays as asterisks). Retype the new password in the *Confirm* field (the password displays again as asterisks).

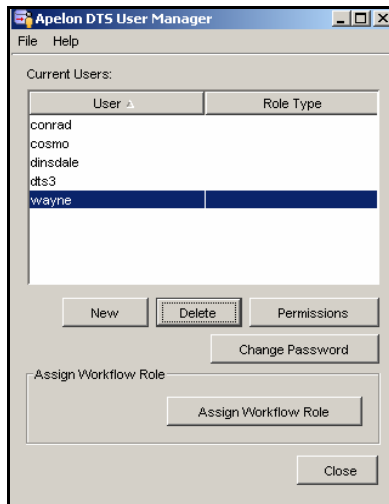


4. Click **OK** to update the user password. Click **Cancel** to ignore the modification.
5. Click **Close** to exit the *Apelon DTS User Manager* window.

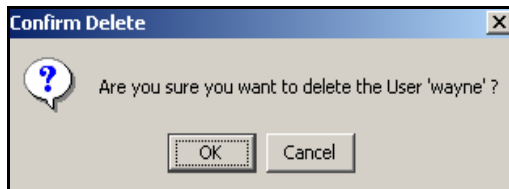
Delete DTS User

Follow this procedure to delete an existing DTS user.

1. To delete an existing DTS user, highlight the username on the *Apelon DTS User Manager* window.



2. Click **Delete**. The following confirmation window displays.

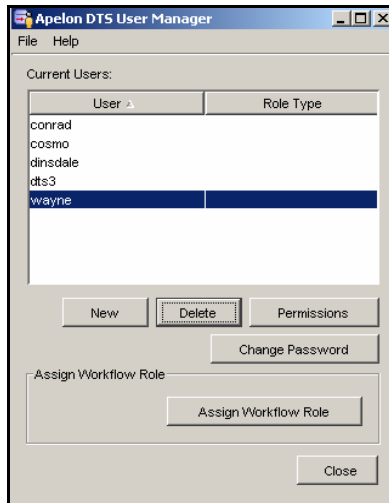


3. Click **Cancel** to ignore the deletion. Click **OK** to delete the username from the list of **Current Users** on the *Apelon DTS User Manager* window.
4. Click **Close** to exit the *Apelon DTS User Manager* window.

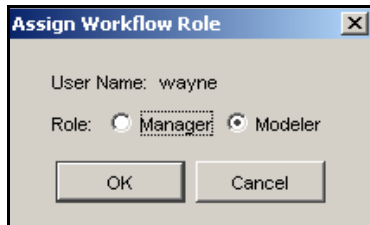
Assign Workflow Role to a User

Follow this procedure to designate a user as a DTS Workflow **Manager** or **Modeler**.

1. To designate a user as a **Manager** or **Modeler** for DTS Workflow, highlight the username on the *Apelon DTS User Manager* window.

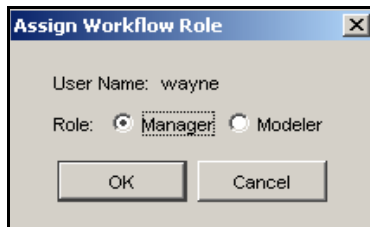


2. Click **Assign Workflow Role**. The *Assign Workflow Role* window displays.



The name of the user for whom you are designating a Workflow role is indicated.

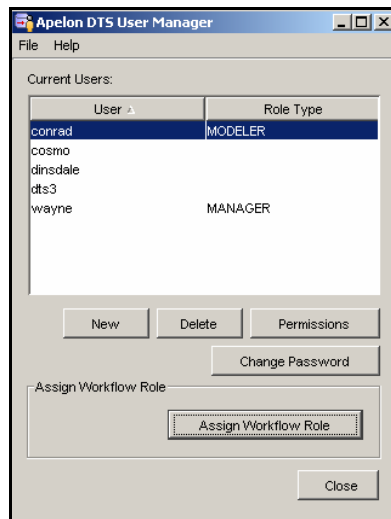
3. Click on **Manager** or **Modeler**, as appropriate (the default is **Modeler**). For this illustration, **Manager** is selected.



A DTS Workflow **Manager** can create, edit, and delete assignments, assign those assignments to Modelers or other Managers, and view/edit assignments created by all other Managers. The Manager also can use the DTS Editor to perform edits on the concepts/terms in the assignments.

A DTS Workflow **Modeler** cannot create assignments, or assign assignments to Modelers or Managers. A Modeler can view all assignments, but can edit only those assignments assigned to **that** Modeler by a DTS Manager, then perform necessary edits to concepts or terms (driven by the assignment) using the DTS Editor.

4. Click **OK**. The *Apelon DTS User Manager* window reflects the assigned role type in the *Role Type* panel.



5. Click **Close** to exit the *Apelon DTS User Manager* window.

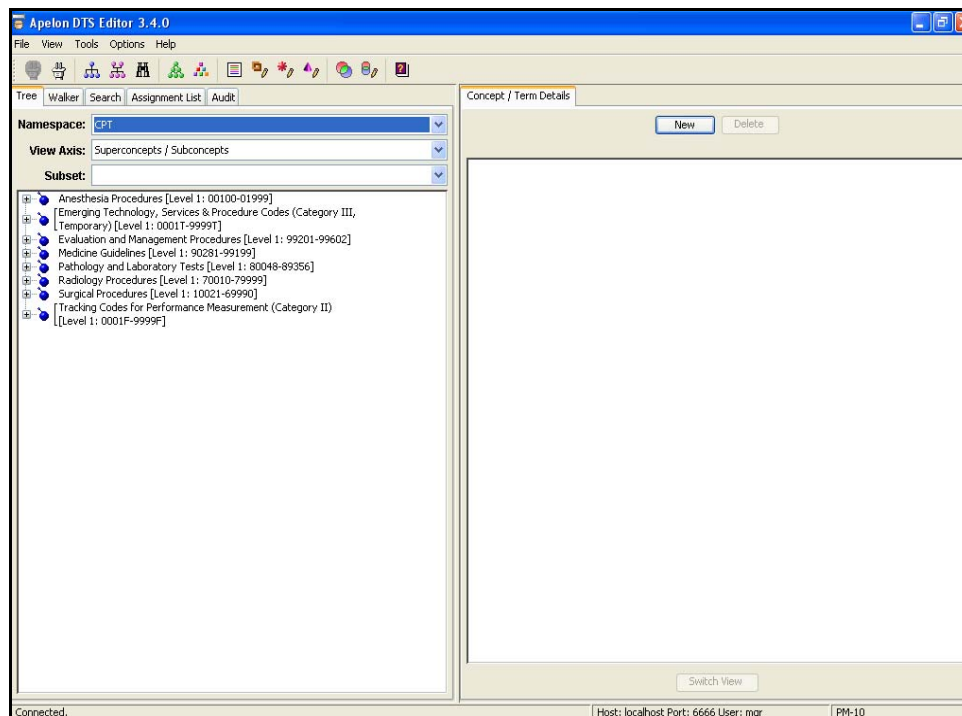
Start DTS Editor With DTS Workflow

Connection and Logon

Before you connect to the DTS Server, confirm that the DTS user has been created with the appropriate namespace permissions and role type (i.e., **Manager** or **Modeler**) using the **DTS User Manager** tool. Refer to the [Managing DTS Users for Workflow](#) discussions for procedures on adding and maintaining DTS users for Workflow.

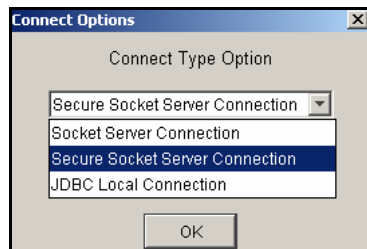
Follow the procedure highlighted in this section to establish a connection to the server where your DTS knowledgebase resides. Because the type of user (**Manager** or **Modeler**) who connects to the DTS Server determines which Workflow functions will be available through the DTS Editor, each user must connect to the DTS Server using a **Secure Socket Server Connection** with **user authentication**.

1. Ensure that the Apelon DTS Server is running, either on your machine or the machine where it was installed. Start the DTS Server on your machine by selecting **Start Apelon DTS Server** from the *Windows* start menu (**Start>Programs>Apelon>DTS 3.4>Start Apelon DTS Server**).
2. Start the DTS Editor from the *Windows* **Start** menu (**Start>Programs>Apelon>DTS 3.4>Apelon DTS Editor**). If there is a shortcut for the DTS Editor, click the shortcut icon. The *DTS Editor Main* window displays.

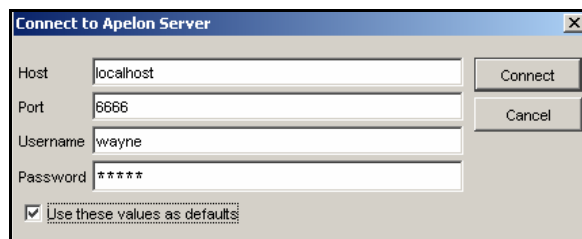


If you performed the DTS Workflow Client plugin installation, the Workflow tabs, **Assignment List** and **Audit**, are included in the window.

- At this point you must specify the required connection to the DTS server. Select **Connect Options** from the **File** menu. When the *Connect Options* window displays, click on the dropdown field to display the available connection options.



- Select **Secure Socket Server Connection** from the *Connect Type Option* dropdown field, then click **OK**. The *Connect to Apelon Server* window displays.



- Enter your *Host* name (for the machine where your DTS Server is running) and *Port* number to access the DTS Server. Since the secure socket connection requires user authentication, also specify your valid *Username* and *Password*. To recall these values for future sessions, click *Use these values as defaults*.

If the *Username* you specified was established with the DTS **Modeler** role type, only the DTS Workflow Modeler functions will be available using the DTS Editor. If the *Username* was established with the **Manager** role type, all DTS Workflow functions (Modeler **and** Manager functions) will be available in the DTS Editor.

- Click **Connect** to establish the secure socket server connection to your DTS Server.

Workflow Manager – View, Create, Edit, and Delete Assignments

An assignment is a list of knowledgebase items (i.e., concepts or terms) that the DTS Workflow Manager creates from one or more namespaces. In the opinion of the Workflow Manager, each item in the assignment requires review and possible edit by a DTS Workflow Modeler (or, a Workflow Manager acting in the Modeler role).

The Modeler selected for the assignment by the Manager then reviews each assignment item. The Modeler can choose to accept the tasks of evaluating the concepts/terms in the assignment, then perform the required concept edits and/or additions, as needed. Concept/term edits made by the Modeler are updated into the namespace **immediately**.

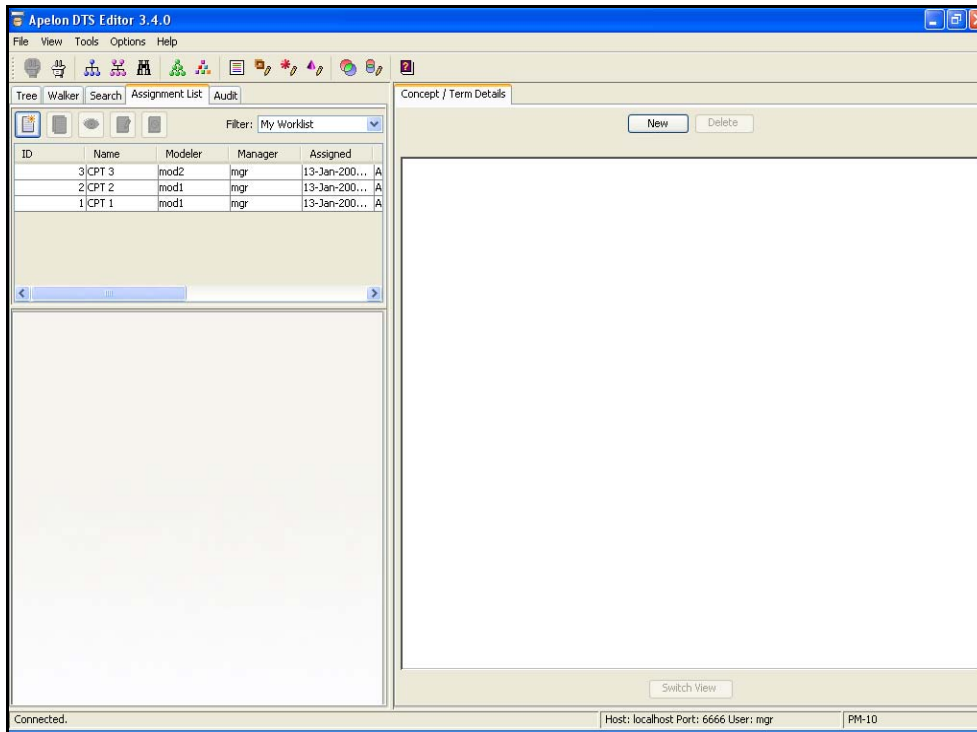
The Modeler marks the assignment as **complete** when he/she is sure no further reviews or edits are needed. If the Modeler thinks additional review or action is required, he/she can mark the assignment as **incomplete**. The Manager then reviews the assignment and associated edits, and determines if additional action is needed for any of the concept/term items in the assignment.

Assignment List Panel

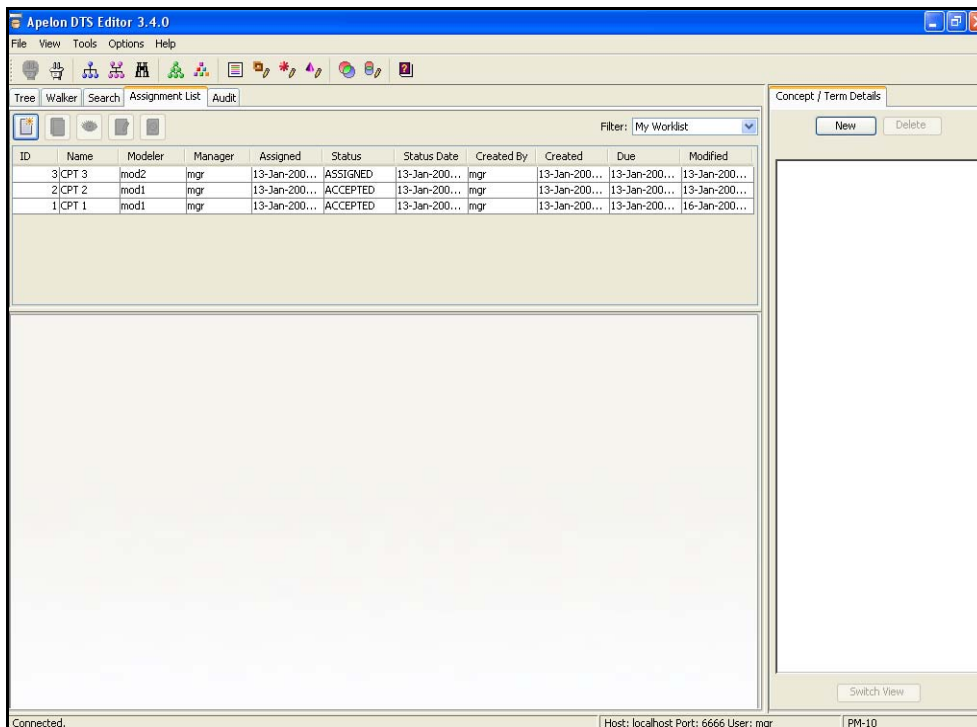
The Manager performs all activity related to creating, editing, and designating assignments on the *Assignment List* panel. The Manager creates a new assignment for Modeler review, and can view, edit, or delete an existing assignment.

The Manager also determines if further action is required on any of the assignment concept/term items based on edits made by the assigned Modeler. A series of filters and sort options allows the Manager to customize assignment lists to display only the most relevant information.

Click the *Assignment List* tab on the *DTS Editor Main* window. The *Assignment List* panel displays, listing assignments in a table format. The panel resembles the following if a **Manager** login username was used to connect to the DTS Server.

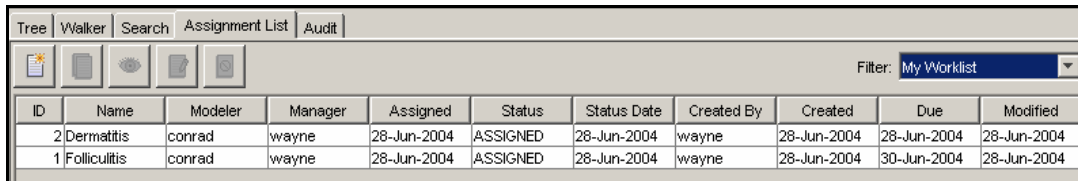


You can resize the *Assignment List* panel, as desired.



View Existing Assignment List

When you click the *Assignment List* tab, the default *Assignment List* panel *Filter* is **My Worklist**. Only those assignments that you assigned as Manager that have not been approved (i.e., Modeler edits have not been approved by a Manager) are listed when **My Worklist** is the selected filter.



ID	Name	Modeler	Manager	Assigned	Status	Status Date	Created By	Created	Due	Modified
2	Dermatitis	conrad	wayne	28-Jun-2004	ASSIGNED	28-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	28-Jun-2004
1	Folliculitis	conrad	wayne	28-Jun-2004	ASSIGNED	28-Jun-2004	wayne	28-Jun-2004	30-Jun-2004	28-Jun-2004

The following information is listed for each assignment when the panel opens. If the information displayed in a cell is truncated, position the cursor over that cell to produce a tooltip window that displays the complete contents of the cell.

ID – The assignment ID, created automatically by DTS Workflow when the Manager creates the assignment

Name – The assignment name (e.g., description) specified by the Manager on creation of the assignment

Modeler – The username of the Modeler who will review assignment items and edit concepts/terms. The Manager can select a Modeler during assignment creation (the status is set to **ASSIGNED**) or at a later time (the **Modeler** column in the *Assignment List* table is left blank, and the status is **UNASSIGNED**). Any Manager can assign a Modeler for an assignment that is **UNASSIGNED**.

Manager – The current Manager of the assignment (i.e., the Manager who most recently assigned the assignment to a Modeler). This Manager can be different from the one who created the assignment; if the assignment was not assigned, no Manager username is indicated

Assigned – The date and time the Manager designated the assignment to a Modeler.

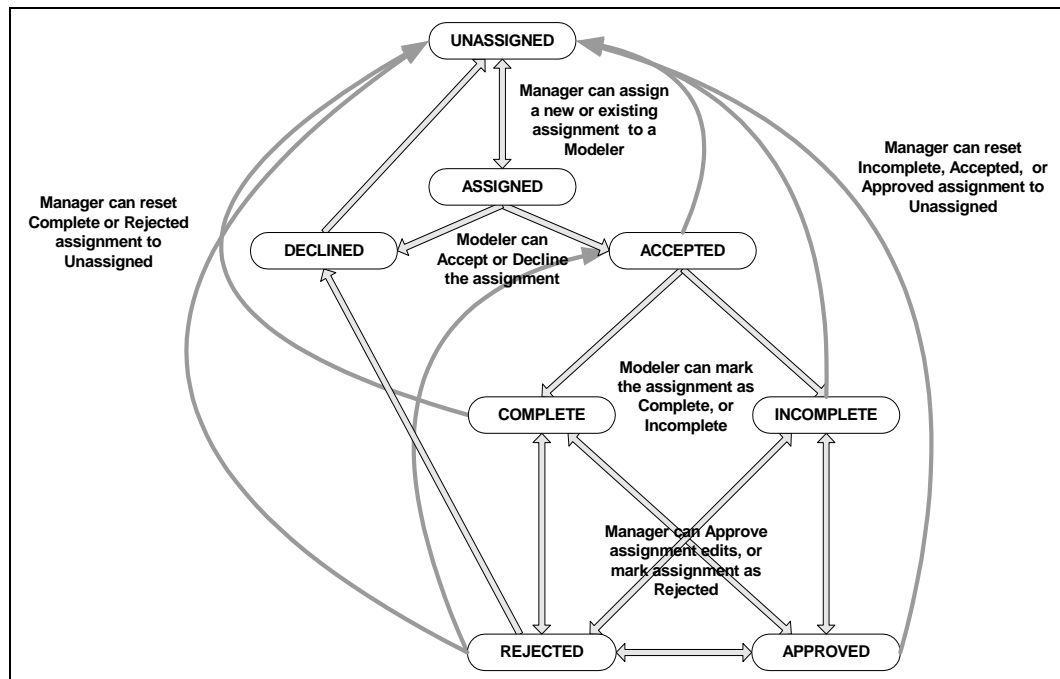
Status – The current status of the assignment

- **UNASSIGNED** – The Manager created the assignment, but did not select a Modeler to review or edit it
 - Only a Manager can create an assignment with **UNASSIGNED** status
 - Only a Manager can change an **UNASSIGNED** assignment to **ASSIGNED**
- **ASSIGNED** – The Manager selected a Modeler to review the assignment and make required edits

- Only a Manager can change an **ASSIGNED** assignment to **UNASSIGNED**, then assign it to another Modeler
 - A Modeler can change an **ASSIGNED** status to **ACCEPTED** (to agree to perform edits) or **DECLINED** (to decline to perform edits)
 - **ACCEPTED** – The Modeler has seen the assignment, and has accepted the tasks of reviewing the items within and making necessary edits
 - Only a Manager can change the **ACCEPTED** status to **UNASSIGNED**, then assign it to a different Modeler
 - A Modeler can change the **ACCEPTED** status to **COMPLETED** when all edits are finished, or to **INCOMPLETE** if only some edits could be completed
 - **DECLINED** – The Modeler has seen the assignment, and has declined the task of reviewing the items within and making necessary edits. A Manager can change the **DECLINED** status to **UNASSIGNED**, then assign the assignment to another Modeler.
 - **INCOMPLETE** – The Modeler has reviewed the items in the assignment and performed edits on some of them, but not all, and has marked the assignment as **incomplete**
 - Only a Manager can change an **INCOMPLETE** assignment to **UNASSIGNED**, then assign it to another Modeler
 - Only a Manager can change an **INCOMPLETE** assignment to **REJECTED** to reject the incomplete edits
 - Only a Manager can change an **INCOMPLETE** assignment to **APPROVED** to approve the edits
 - **COMPLETED** – The Modeler has reviewed the items in the assignment and performed all necessary edits, and has marked the assignment as **complete**
 - Only a Manager can change a **COMPLETED** assignment to **UNASSIGNED**, then assign it to another Modeler
 - Only a Manager can change a **COMPLETED** assignment to **REJECTED** to reject the edits
 - Only a Manager can change a **COMPLETED** assignment to **APPROVED** to approve the completed edits
 - **REJECTED** – The Manager has rejected the Modeler edits for a completed or incomplete assignment
 - Only a Manager can change a **REJECTED** assignment to **UNASSIGNED**, then assign it to another Modeler
-

- Only a Manager can change a **REJECTED** assignment to **COMPLETED** (e.g., if it was rejected accidentally)
- Only a Manager can change a **REJECTED** assignment to **INCOMPLETE** (e.g., if it was rejected accidentally)
- Only a Manager can change a **REJECTED** assignment to **APPROVED** to approve the completed edits
- A Modeler can change a **REJECTED** assignment to **ACCEPTED** (to agree to perform edits) or **DECLINED** (to decline to perform edits)
- **APPROVED** – The Manager has approved the Modeler edits for a completed or incomplete assignment
 - Only a Manager can change an **APPROVED** assignment to **REJECTED** (e.g., if it was approved accidentally)
 - Only a Manager can change an **APPROVED** assignment to **COMPLETED** (e.g., if it was approved accidentally)
 - Only a Manager can change an **APPROVED** assignment to **INCOMPLETE** (e.g., if it was approved accidentally)
 - Only a Manager can change an **APPROVED** assignment to **UNASSIGNED**, then assign it to another Modeler for rework

The following illustration indicates status edit privileges for Managers and Modelers.



Status Date – The date and time the assignment status last changed

Created By – The Manager who created the assignment

Created – The date and time the assignment was created by the Manager

Due – The date and time the Manager expects completion of the assignment by the designated Modeler. If the Manager did not specify a due date for the assignment, the assignment creation date and time are the defaults.

Modified – The date and time the assignment was last modified (whether or not the assignment status changed as a result)

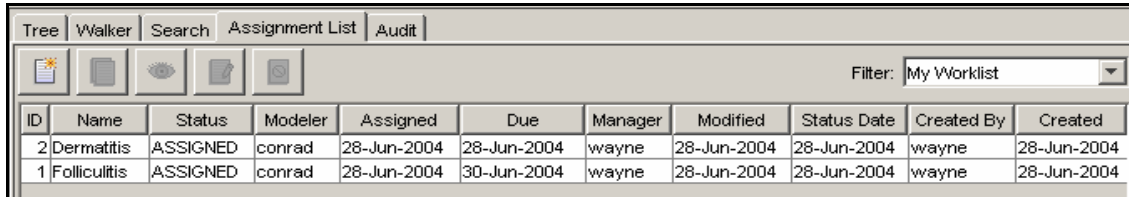
Filter Assignment List

To filter the list to view only those assignments that interest you, click the *Filter* field dropdown arrow. The filter options are listed.

- **My Worklist** - Assignments **assigned** by the Manager that are not **APPROVED**
- **My Assignments** - Assignments **created** by the Manager that are not **APPROVED**
- **My Worklist As Modeler** - Assignments assigned to the Modeler that are **ASSIGNED**, **ACCEPTED**, or **REJECTED**
- **All Last 7 Days** - Assignments that have had a status update in last 7 days
- **All Last 30 Days** - Assignments that have had a status update in the last 30 days
- **All Unassigned** - All assignments with **UNASSIGNED** status
- **All Assigned** - All assignments with **ASSIGNED** status
- **All Accepted** - All assignments with **ACCEPTED** status
- **All Declined** - All assignments with **DECLINED** status
- **All Completed** - All assignments with **COMPLETED** status
- **All Incomplete** - All assignments with **INCOMPLETE** status
- **All Rejected** - All assignments with **REJECTED** status
- **All Approved** - All assignments with **APPROVED** status
- **All** - All assignments (no filter)

Customize Assignment List Table Layout

You can reposition the *Assignment List* table columns by dragging/dropping the column headers into their new positions. You also can resize each column, as needed (note the illustration). The column position and size settings are retained throughout the current session.



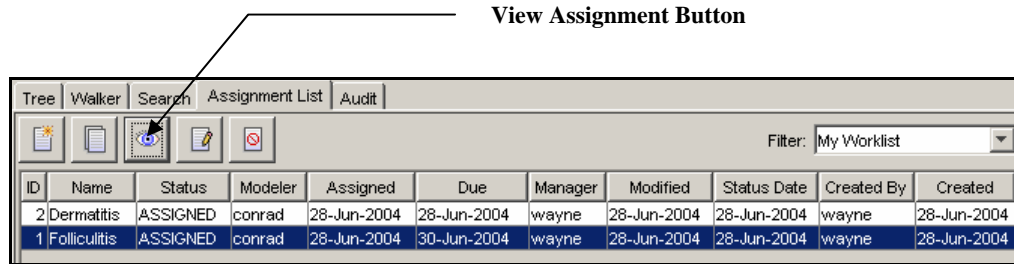
ID	Name	Status	Modeler	Assigned	Due	Manager	Modified	Status Date	Created By	Created
2	Dermatitis	ASSIGNED	conrad	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004
1	Folliculitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004

You can resort the table data by clicking the desired (sort) header once. The **first click** sorts the table in ascending order; the **second click** sorts in descending order. Click the column header a third time to remove the sort. You can establish a secondary sort by pressing the **Control** key, then clicking the secondary sort column.

View Assignment Detail

Follow this procedure to view details for each individual assignment listed in the *Assignment List* table.

1. Click the assignment in the *Assignment List* table to highlight it, then click the **View Assignment** button in the *Assignment List* panel toolbar.



The lower portion of the *Assignment List* panel displays details for the assignment you selected. Note the tab at the bottom of the display indicates the number of the assignment, and also that the assignment is in **View** mode.

Tree Walker Search Assignment List Audit

Filter: My Worklist

ID	Name	Status	Modeler	Assigned	Due	Manager	Modified	Status Date	Created By	Created
2	Dermatitis	ASSIGNED	conrad	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004
1	Folliculitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004

Name: Folliculitis

Due Date: 30-Jun-2004 Created: 28-Jun-2004

Assigned To: conrad Assigned By: wayne

Status: ASSIGNED

Details Notes

Complete	Type	Name	ID	Code	Namespace	Added By	Notes
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne	

Close

View Assignment #1

None of the assignment detail is editable in View mode; all fields are disabled for edit. Click the [Edit Assignment](#) button to perform edits on the selected concept.

The following assignment detail is listed in View mode.

- **Name** – A brief description of the assignment, entered by the Manager when the assignment was created, or modified subsequently by a Manager.
- **Due Date** – The expected completion date for the assignment, entered by the Manager when the assignment was created, or modified subsequently by a Manager.
- **Assigned To** – The DTS user (i.e., Modeler) to whom the Manager issued this assignment when the assignment was created, or when the assignment was modified subsequently by a Manager.
- **Status** – The current [status](#) of the assignment.
- **Created** – The date the Manager created the assignment.
- **Assigned By** – The Manager who designated the Modeler for this assignment (this can be a Manager other than the one who created the assignment).

2. Ensure the *Details* tab is selected to list the items that reference the concepts/terms the Manager selected for review and/or edit by the Modeler. Assignment items are listed in table format in the lower portion of the panel.

The following detail is included for each concept/term item in the assignment.

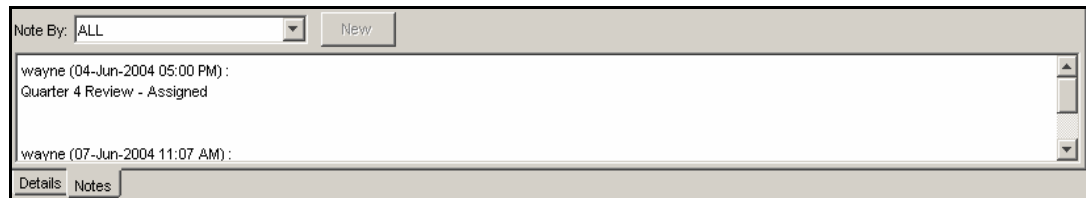
- **Complete** – If the checkbox is checked, it indicates that the Modeler has reviewed this individual item, completed necessary edits, and marked this individual item as **COMPLETE**
- **Type** – The type of namespace item for review and/or edit by the Modeler, **Concept** or **Term**
- **Name** – The name of the concept or term the Manager selected for Modeler review or edit
- **ID** – The concept or term ID
- **Code** – The concept or term code
- **Namespace** – The namespace from which the Manager selected the concept or term to be reviewed or edited. Concepts and terms from multiple namespaces can be included in the same assignment.
- **Added By** – The Manager who added the concept/term item (this can be a Manager other than the one who created the assignment)
- **Notes** – The Manager can enter a note (e.g., review or edit instructions) for each individual concept/term item in the assignment when the assignment is created. Any Manager can enter notes for individual items during subsequent edit of the assignment.

Each individual assignment note can be up to 1024 characters..If the note text in the cell is truncated, position the cursor over that cell to display a tooltip window that includes the complete text of the note.

Note that if the detailed information displayed in **any** cell is truncated, you can position the cursor over that cell to produce a tooltip window that displays the complete contents of the cell. You also can reposition the assignment items table columns by dragging/dropping the column headers into their new positions, and/or resize each column, as needed.

You also can resort the table data by clicking the desired (sort) header once. The **first click** sorts the table in ascending order; the **second click** sorts in descending order. Click the column header a third time to remove the sort. You can establish a secondary sort by pressing the **Control** key, then clicking the secondary sort column.

3. The Manager who creates the assignment has the option to create notes regarding the assignment. Any Manager also may enter additional notes after the assignment is created (i.e., when the assignment is opened in [Edit](#) mode). To view notes related to the entire assignment, click the *Notes* tab. All notes entered for the assignment are listed in the notes display area.



In addition to the note text, each note includes the date and time the note was created. You can restrict the display to a single note for the assignment by selecting the username and time stamp for the note from the *Note By* field dropdown list.

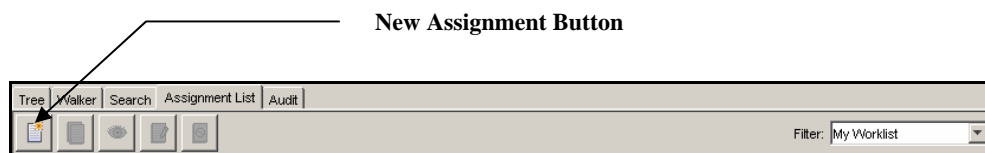
4. Click the *Details* tab to redisplay the assignment detail.
5. Click **Close** to close the detail portion of the *Assignment List* panel. This indicator tab (**View Assignment #nn**) remains displayed in the bottom portion of the window until you close the assignment view.

At this point you can select another assignment from the *Assignment List* panel table, or click any other indicator tab (**View Assignment**, **Edit Assignment**, etc.) at the bottom of the display to resume that function.

Create an Assignment for a Modeler

Follow this procedure to create a new assignment for review and/or edit by a modeler, or by another Manager.

1. To create a new assignment for a Modeler, click the **New Assignment** button in the *Assignment List* panel toolbar.



The lower portion of the panel displays fields for the entry of information for the new assignment; note that the *Details* tab on the panel is selected as the default. An indicator at the bottom of the panel designates **New Assignment**.

Tree Walker Search Assignment List Audit

Filter: My Worklist

ID	Name	Status	Modeler	Assigned	Due	Manager	Modified	Status Date	Created By	Created
1	Folliculitis	ASSIGNED	iconrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004

Name:

Due Date: 28-Jun-2004

Assigned To: <NOT SET>

Details Notes

Complete	Type	Name	ID	Code	Namespace	Added By	Notes
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OK Cancel

New Assignment

2. Enter a brief description of the assignment in the *Name* field.
3. In the *Due Date* field you can specify the expected completion date for the assignment. You can specify the due date in the format shown, or you can click the drop arrow adjacent to the field to display a calendar for date selection.

Name: Dermatitis

Due Date: 30-Jun-2004

Assigned To: June 2004

Details Note

Mo	Tu	We	Th	Fr	Sa	Su
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Complete

ID	Code	Namespace	Added By	Notes
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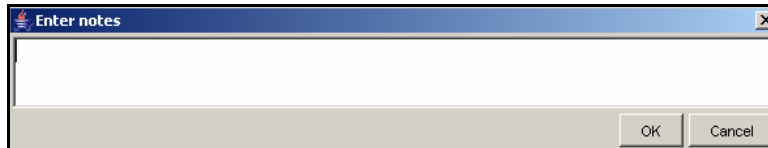
OK Cancel

Select the year and month from the appropriate field dropdown lists, then click the due date on the displayed calendar. The date you select displays in the *Due Date* field on the *Assignment List* panel.

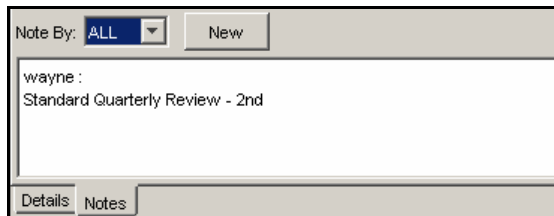
4. From the *Assigned To* field dropdown list, select the DTS user (i.e., a Modeler, or another Manager) to whom you are issuing this assignment. All established DTS Workflow users are included in the list (both **Modelers** and **Managers**). Refer to the [Managing DTS Users for Workflow](#) discussions earlier in the guide for procedures on creating and maintaining DTS users who use Workflow.

When you select a Modeler for the assignment, the assignment status changes to **ASSIGNED**. If you do not select a Modeler, the assignment status remains as **UNASSIGNED** (you can save the new assignment with an **UNASSIGNED** status, then you, or another Manager, can edit the assignment and assign the Modeler at a later time).

5. You have the option of entering notes that pertain to the entire assignment. Click the *Notes* tab, then click the **New** button that displays subsequently. The *Enter Notes* window displays.



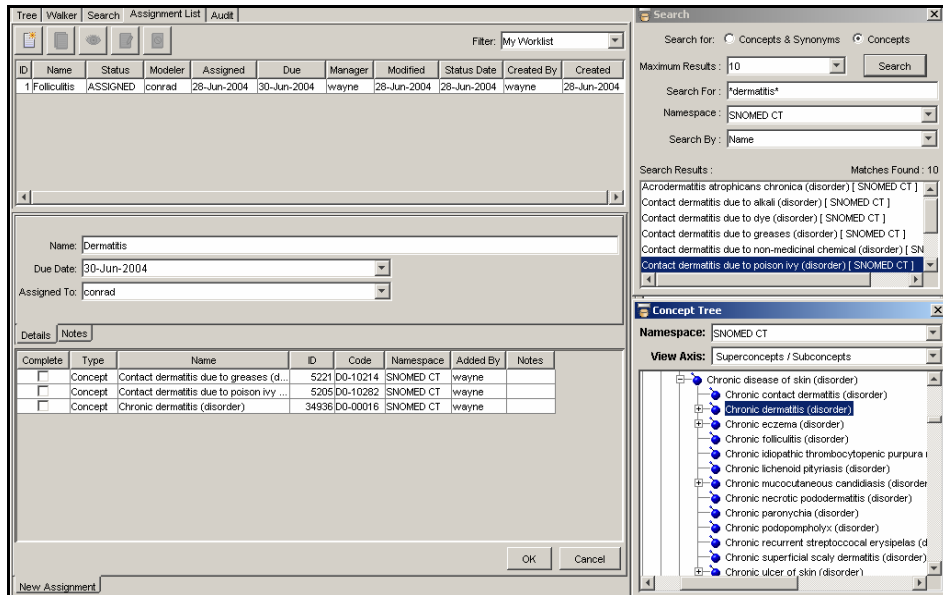
Enter the note you want associated with the assignment, then click **OK**. The note is listed in the display area on the *Notes* tab.



Click the *Details* tab to redisplay the assignment detail.

6. At this point you can select the concepts that are to be reviewed and/or edited by the selected Modeler for this assignment. From the *Concept Tree*, *Concept Walker*, or *Search* panel, drag each concept you want to add and drop it into the lower portion of the *Assignment List* panel. Each assignment item displays in a table format.

Note the following illustration, where individual concepts were selected from the *Concept Tree* and *Search* windows.

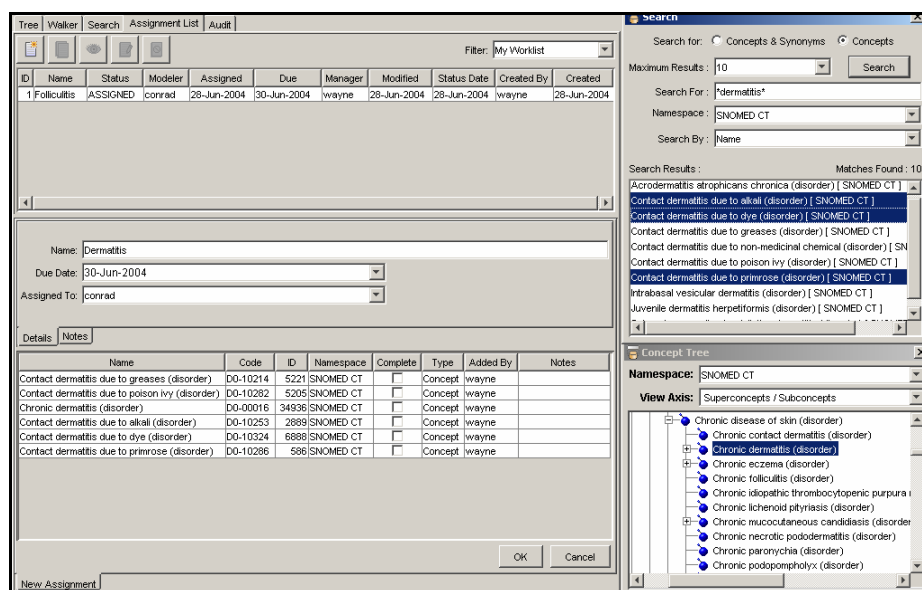


For each concept you drag into the *Assignment List* panel, the concept **Type**, **Name**, and **Namespace** are listed. (The **Complete** checkbox is an indicator that designates if the Modeler has completed editing the concept/term in the assignment.)

For each item you can reposition the columns by dragging/dropping the column headers into their new positions. You also can resize each column, as needed (note the illustration).

Name:	Dermatitis						
Due Date:	30-Jun-2004						
Assigned To:	conrad						
<div>Details</div> <div>Notes</div>							
Name	Code	ID	Namespace	Complete	Type	Added By	Notes
Contact dermatitis due to greases (disorder)	D0-10214	5221	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
Contact dermatitis due to poison ivy (disorder)	D0-10282	5205	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
Chronic dermatitis (disorder)	D0-00016	34936	SNOMED CT	<input type="checkbox"/>	Concept	wayne	

Using standard *Windows* selection procedures, you also can select **multiple items** (i.e., concepts or terms) from another displayed panel (e.g., the *Search* panel) and drop them into the *Assignment List* panel. Note the illustration, in which several items from the *Search* panel were selected and dropped into the *Assignment List* panel.








7. You can resort the table data by clicking the desired (sort) header once. The first click sorts the table in ascending order, the second sorts in descending order; click the header a third time to remove the sort. You can establish a secondary sort by pressing the **Control** key, then clicking the secondary sort column.
8. You can enter note text (e.g., instructions to the Modeler regarding the review or edit that is required) for **each individual concept/term item** when the assignment is created. Any Manager also can enter note text during subsequent edit of the assignment.

To enter note text for a line item, enter the desired text in the *Notes* column field on the desired line.

Details		Notes						
Name	Code	ID	Namespace	Complete	Type	Added By	Notes	
Contact dermatitis due to greases (disorder)	D0-10214	5221	SNOMED CT	<input checked="" type="checkbox"/>	Concept	wayne	Pending Review	
Contact dermatitis due to poison ivy (disorder)	D0-10282	5205	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Chronic dermatitis (disorder)	D0-00016	34936	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Contact dermatitis due to alkali (disorder)	D0-10253	2889	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Contact dermatitis due to dye (disorder)	D0-10324	6888	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Contact dermatitis due to primrose (disorder)	D0-10286	586	SNOMED CT	<input type="checkbox"/>	Concept	wayne		

9. After you complete entry of assignment information, click **OK**. The detail portion of the *Assignment List* panel is cleared, and the new assignment is added to the assignment list table in the top portion of the panel. Note the highlighted line in the illustration.

Tree Walker Search Assignment List Audit



Filter: My Worklist

ID	Name	Status	Modeler	Assigned	Due	Manager	Modified	Status Date	Created By	Created
3	Dermatitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004
1	Folliculitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004

Note that you can click the **Refresh Assignment List** option in the **Tools** menu at any time to update the assignment list table.

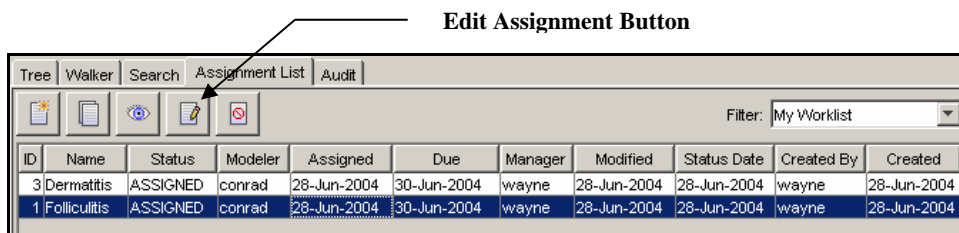
- If you selected a Modeler for the assignment, the assignment status is **ASSIGNED**, and the Modeler is reflected in the **Modeler** column. When the Modeler logs into DTS Workflow, this assignment will be listed with any others assigned to the Modeler.

If you designated a Modeler to review the assignment for edits (or to another Manager acting in the role of a Modeler) the assignment can be retrieved and viewed by that individual. Refer to the [Modeler – Review Assignments and Perform Concept Edits](#) discussion for procedures on performing concept edits from the assignment, and updating the assignment status subsequently.

Edit an Assignment

As a Manager, you can edit any assignment. The degree of edit capability available depends on the status of the assignment. A status of **UNASSIGNED** offers the greatest degree of edit capability. If the assignment is **APPROVED**, only the assignment *Status* can be modified (however, the status can be set to **UNASSIGNED** to provide more editing flexibility).

- In the listing of assignments on the *Assignment List* panel, double-click the assignment you want to edit, or click the assignment to highlight it, then click the **Edit Assignment** button in the *Assignment List* panel toolbar.



Another way to open the assignment in Edit mode is to select **Go To Assignment** from the **Tools** menu. The following window displays.

Go To Assignment

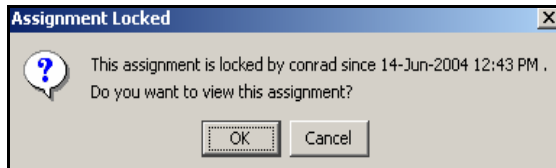
Enter Assignment ID:

OK

Cancel

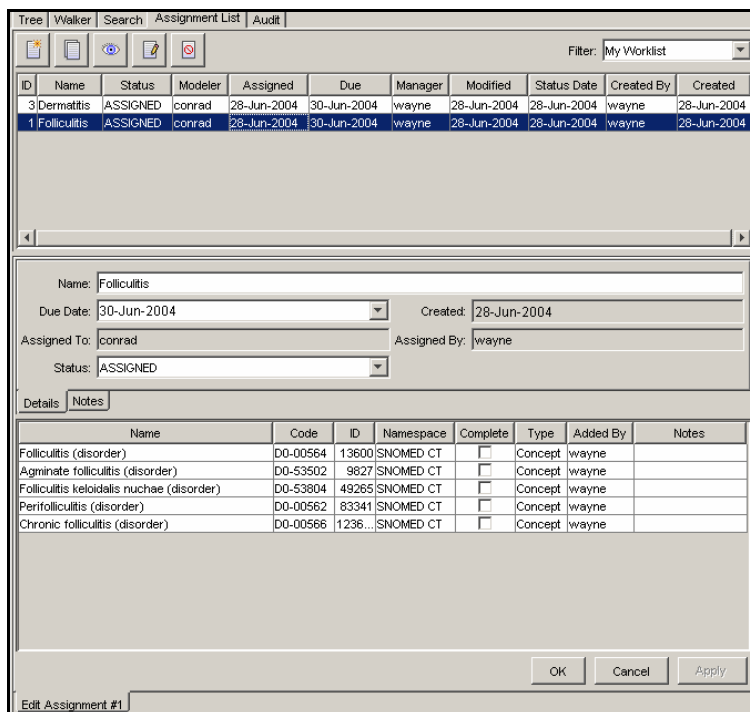
Enter the ID number of the assignment you want to edit, then click **OK**.

Note that if the Modeler, or another Manager, has the assignment opened in Edit mode, a **lock** is placed on the assignment to prevent edit conflicts. A window similar to the following displays to indicate who has the assignment open in Edit mode, and the time the assignment was locked.



You have the option of viewing the assignment, or unlocking it. Refer to the *Unlock an Assignment* discussion.

If the assignment is not locked, it is available for edit. The lower portion of the panel displays details for the assignment you selected.

A screenshot of the "Assignment List" panel. It has tabs for "Tree", "Walker", "Search", "Assignment List", and "Audit". The "Assignment List" tab is active, showing a table with columns: ID, Name, Status, Modeler, Assigned, Due, Manager, Modified, Status Date, Created By, and Created. The table has two rows: "3 Dermatitis" and "1 Folliculitis". The "Folliculitis" row is selected. Below the table is a form for the selected assignment, showing fields for Name, Due Date, Created, Assigned To, Assigned By, and Status. Below the form is a "Details" tab, which is active, showing a table with columns: Name, Code, ID, Namespace, Complete, Type, Added By, and Notes. The table lists five entries related to "Folliculitis". At the bottom of the panel are "OK", "Cancel", and "Apply" buttons. A label "Edit Assignment #1" is at the bottom left.

The tab at the bottom of the *Assignment List* panel indicates the number of the assignment, and also that the assignment is in **Edit** mode.

In the detail portion of the panel, the date the assignment was *Created* is listed, as well as the Manager who assigned the assignment to the Modeler (in the *Assigned By* field). These fields are for reference only.

2. Modify the assignment *Name* and *Due Date*, as necessary.
3. When a Modeler is designated for an assignment, the *Assigned To* field reflects the name of the Modeler, and the assignment *Status* is set to **ASSIGNED**. If a Modeler was assigned, the *Assigned To* field is disabled.

In order to designate another Modeler for the assignment, you must change the *Status* to **UNASSIGNED**, then save the assignment (click **Apply**). The *Assigned To* field is reset to **<NOT SET>**. You then can select another Modeler from the *Assigned To* field pulldown list; when you save the assignment again, the *Status* is updated to **ASSIGNED**.

If the assignment *Status* is **COMPLETED** (indicating that the Modeler has completed the assignment reviews and edits) you can change the assignment status to **APPROVED** or **REJECTED**.

4. The Manager who creates the assignment has the option to create notes regarding the entire assignment. Any Manager also may enter additional notes after the assignment is created. To add additional notes for the assignment, click the *Notes* tab, then click the **New** button that displays subsequently. The *Enter Notes* window displays.

Enter the new note you want associated with the assignment, then click **OK**. The new note is listed in the display area on the *Notes* tab.

Click the *Details* tab to redisplay the assignment detail information.

5. You also can enter note text for **each individual concept/term item** in the assignment (e.g., details to the Manager regarding the edits performed). To enter note text for a line, enter the text in the *Notes* column field on the desired line.

Details								Notes
Name	Code	ID	Namespace	Complete	Type	Added By	Notes	
Folliculitis (disorder)	D0-00564	13600	SNOMED CT	<input type="checkbox"/>	Concept	wayne	Add REVIEWED prop type	
Agminate folliculitis (disorder)	D0-53502	9827	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Folliculitis keloidalis nuchae (disorder)	D0-53804	49265	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Perifolliculitis (disorder)	D0-00562	83341	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Chronic folliculitis (disorder)	D0-00566	1236...	SNOMED CT	<input type="checkbox"/>	Concept	wayne		

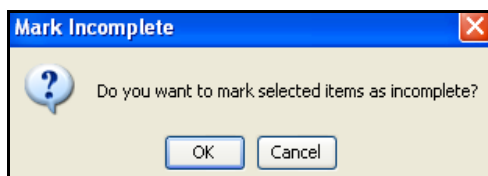
Any Manager can perform all of the assignment tasks that a Modeler can perform. These tasks include edits driven by an assignment. If edits are completed for an individual item, you can update the status of each individual item in the assignment item table as **COMPLETE** by clicking the *Complete* checkbox.

Details		Notes						
Name	Code	ID	Namespace	Complete	Type	Added By	Notes	
Folliculitis (disorder)	D0-00564	13600	SNOMED CT	<input checked="" type="checkbox"/>	Concept	wayne	Add REVIEWED prop type	
Agminate folliculitis (disorder)	D0-53502	9827	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Folliculitis keloidalis nuchae (disorder)	D0-53804	49265	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Perifolliculitis (disorder)	D0-00562	83341	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Chronic folliculitis (disorder)	D0-00566	1236...	SNOMED CT	<input type="checkbox"/>	Concept	wayne		

You also can right-click anywhere on the individual item, then click **Mark Complete** when the resulting options display to update the item status as **COMPLETE**. A check mark is inserted in the *Complete* checkbox.

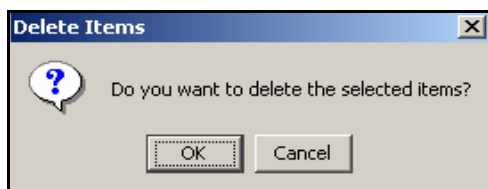
Details		Notes						
Name	Code	ID	Namespace	Complete	Type	Added By	Notes	
Folliculitis (disorder)	D0-00564	13600	SNOMED CT	<input checked="" type="checkbox"/>	Concept	wayne	Add REVIEWED prop type	
Agminate folliculitis (disorder)	D0-53502	9827	SNOMED CT	<input type="checkbox"/>	Concept	wayne		
Folliculitis keloidalis nuchae (disorder)	D0-53804	49265	SNOMED CT	<input checked="" type="checkbox"/>	Concept	wayne	Mark Complete	
Perifolliculitis (disorder)	D0-00562	83341	SNOMED CT	<input type="checkbox"/>	Concept	wayne	Mark Incomplete	
Chronic folliculitis (disorder)	D0-00566	1236...	SNOMED CT	<input type="checkbox"/>	Concept	wayne	Delete	
							Add New Concept/Term	
							✓ Click To Edit	
							✓ Multiple Selection	

If one or more completed items require additional review and/or edit, click **Mark Incomplete** for the highlighted items (use standard *Windows* selection procedures to select and highlight the lines). The following window displays.



Click **OK**. The check is removed from the *Complete* checkbox for the item(s).

6. A Modeler can delete only items that he/she has added (not those assigned by a Manager). To delete one or more items (whether marked as completed or not) click **Delete** for the highlighted items (use standard *Windows* selection procedures to select and highlight the lines). The following window displays



Click **OK** to confirm deletion of the item(s) from the assignment.

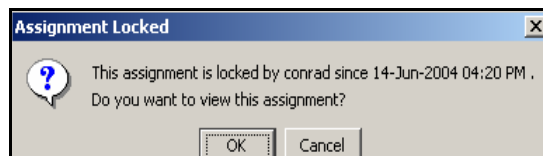
7. Click **OK** to update the assignment with your edits, and close the *Detail* tab section of the *Assignment List* panel. The tab at the bottom of the *Assignment List* panel indicating that the assignment is in **Edit** mode is removed. Your assignment edits are reflected in the assignments list table in the panel. Note that you can click the **Refresh Assignment List** option in the **Tools** menu at any time to update the assignment list table.

Click **Apply** to update the assignment with your edits, and leave the *Detail* tab section of the *Assignment List* panel open for further review and edit. Your edits up to the moment are reflected for the assignment in the assignment table in the upper portion of the panel. Click **Cancel** to disregard current assignment edits.

Unlock an Assignment

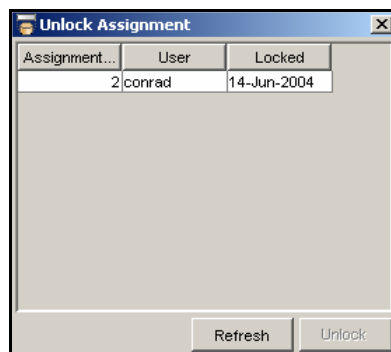
If the Modeler or another Manager has an assignment opened in Edit mode, a **lock** is placed on the assignment. This helps to prevent edit conflicts by an assignment being open for edits to two individuals simultaneously.

1. If another user has an assignment opened in Edit mode, a window similar to the following displays to indicate who has the assignment open in Edit mode, and the time the assignment was locked.



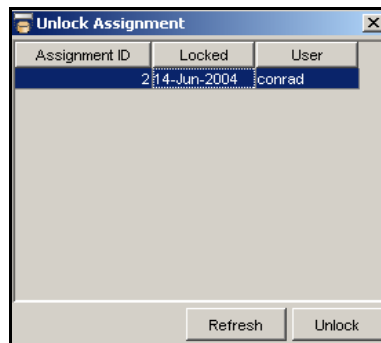
You have the option of viewing the assignment, or unlocking it. Click **OK** to view the assignment only.

2. To unlock the assignment, click **Cancel**, then select **Unlock Assignment** from the **Tools** menu. The *Unlock Assignment* window displays.

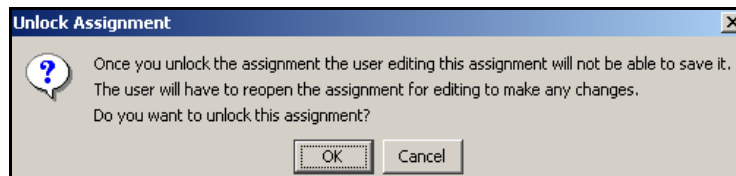


The user who has the assignment open for edit is listed for each locked assignment. You can resize the window as desired, and also change the column order and size (column order and size settings are retained for future sessions).

- Click the assignment you want to unlock to highlight it; the **Unlock** button becomes enabled.



Click **Unlock**. The following message window displays.

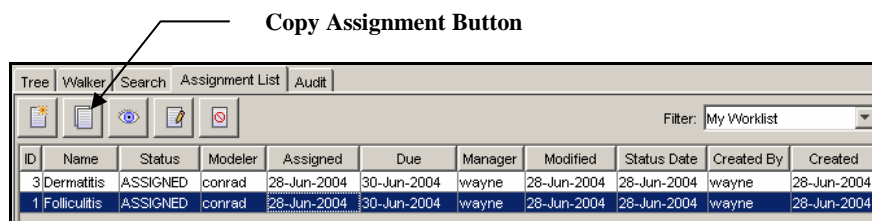


- Click **OK** to unlock the assignment and make it available for your own edits. The user who initially had the assignment open for edit will not be able to save any edits that were not already updated. That user must reopen the assignment in Edit mode in order to perform edits.

Copy an Assignment

If you want to create a new assignment that includes all, or most, of the items (i.e., concepts/terms for Modeler review and edit) in an existing assignment, you can copy the assignment items to a new assignment. You then can specify a name and due date for the new assignment, and assign it to a Modeler.

- In the listing of assignments on the *Assignment List* panel, click the assignment you want to copy to highlight it, then click the **Copy Assignment** button in the *Assignment List* panel toolbar.



The assignment items table in the lower portion of the panel reflects the items from the assignment you selected to copy. None of the other details from the source (i.e., copy from) assignment is copied to the new assignment.

The screenshot shows the 'Assignment List' window. At the top, there's a menu bar with 'Tree', 'Walker', 'Search', 'Assignment List', and 'Audit'. Below it is a toolbar with icons for adding, deleting, and other actions. A filter dropdown is set to 'My Worklist'. The main table lists assignments with columns: ID, Name, Status, Modeler, Assigned, Due, Manager, Modified, Status Date, Created By, and Created. The first row is highlighted in blue.

ID	Name	Status	Modeler	Assigned	Due	Manager	Modified	Status Date	Created By	Created
3	Dermatitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004
1	Folliculitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004

Below the table, there's a 'New Assignment' section with fields for Name, Due Date (28-Jun-2004), and Assigned To (<NOT SET>). At the bottom, there's a 'Details' tab and a table of related concepts.

Name	Code	ID	Namespace	Complete	Type	Added By	Notes
Folliculitis (disorder)	D0-00564	13600	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
Agminate folliculitis (disorder)	D0-53502	9827	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
Folliculitis keloidalis nuchae (disorder)	D0-53804	49265	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
Perifolliculitis (disorder)	D0-00562	83341	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
Chronic folliculitis (disorder)	D0-00566	1236...	SNOMED CT	<input type="checkbox"/>	Concept	wayne	

At the bottom right are 'OK' and 'Cancel' buttons. At the bottom left is a 'New Assignment' button.

The indicator tab at the bottom of the panel specifies **New Assignment**.

2. Enter a brief description of the new assignment in the *Name* field.
3. In the *Due Date* field you can specify the expected completion date for the new assignment. You can specify the due date in the format shown, or you can click the drop arrow adjacent to the field to display a calendar for date selection.

This screenshot shows the 'New Assignment' dialog box. The 'Name' field contains 'Chronic Skin Disorders'. The 'Due Date' field is set to '30-Jun-2004'. The 'Assigned To' field shows a dropdown menu with 'June' and '2004' selected. A calendar is displayed, showing the month of June 2004. The calendar has a header with days of the week (Mo, Tu, We, Th, Fr, Sa, Su) and a grid of dates. The date '30' is highlighted. Below the calendar, there's a table of related concepts, similar to the one in the first screenshot.

ID	Namespace	Complete	Type	Added By	Notes
13600	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
9827	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
49265	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
83341	SNOMED CT	<input type="checkbox"/>	Concept	wayne	
1236...	SNOMED CT	<input type="checkbox"/>	Concept	wayne	

Select the year and month from the appropriate field dropdown lists, then click the due date on the displayed calendar. The date you select displays in the *Due Date* field on the *Assignment List* panel.

4. From the *Assigned To* field dropdown list, select the DTS user to whom you are issuing the new assignment. All established DTS users are included in the list (both **Modelers** and **Managers**). Refer to the [Managing DTS Users for Workflow](#) discussions for procedures on creating and maintaining DTS users.

When you designate a Modeler or Manager for the assignment, the assignment status changes to **ASSIGNED** when you save the assignment. If you do not select a Modeler, the assignment status remains as **UNASSIGNED**.

5. You have the option of entering notes pertaining to the entire new assignment. Click the *Notes* tab, then click the **New** button that displays subsequently. The *Enter Notes* window displays.

Enter the note you want associated with the assignment, then click **OK**. The note is listed in the display area on the *Notes* tab.

6. Click the *Details* tab to redisplay the assignment detail information.
7. Click **OK**. The new assignment is added to the assignment list table in the top portion of the *Assignment List* panel.

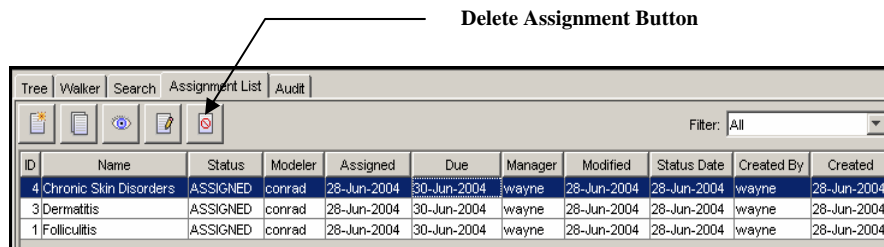
ID	Name	Status	Modeler	Assigned	Due	Manager	Modified	Status Date	Created By	Created
4	Chronic Skin Disorders	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004
3	Dermatitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004
1	Folliculitis	ASSIGNED	conrad	28-Jun-2004	30-Jun-2004	wayne	28-Jun-2004	28-Jun-2004	wayne	28-Jun-2004

The *Detail* tab section of the *Assignment List* panel is closed, and the indicator tab at the bottom of the *Assignment List* panel indicating **New Assignment** is removed. Note that you can click the **Refresh Assignment List** option in the **Tools** menu at any time to update the assignment list table.

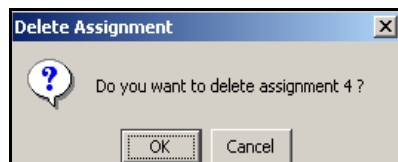
Delete an Assignment

You can delete an assignment only if it has never been accepted by a Modeler (i.e., you cannot delete an assignment with **ACCEPTED** status; the **Delete** button is disabled when a selected assignment cannot be deleted).

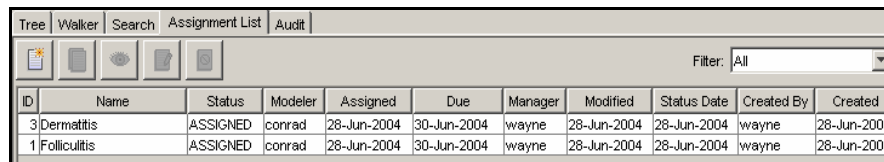
1. In the listing of assignments on the *Assignment List* panel, click the assignment you want to delete to highlight it, then click the **Delete Assignment** button in the *Assignment List* panel toolbar.



2. A *Confirmation* window references the assignment number.

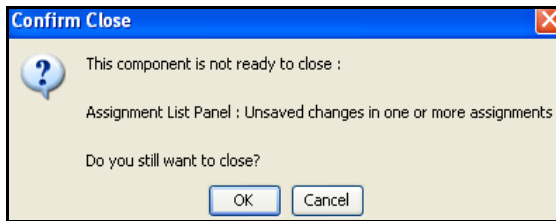


3. Click **OK**. The assignment is removed from the *Assignment List* panel table.



Disconnect From the DTS Editor

Select **Disconnect** from the **File** menu, or click the toolbar **Disconnect** icon. If there is unsaved data (new or modified) in one of the DTS Editor components, including one of the DTS Workflow tabs, a confirmation window similar to the following displays.



Click **Yes** to close the component and disconnect without reviewing or updating unsaved data; displayed floating panels are closed when you disconnect. Click **Cancel** to disregard the disconnect request.

DTS Workflow Modeler – Review Assignments/Perform Edits

Both DTS Workflow Modelers **and** Managers can review any assignment. For any assignment, a Manager can use the DTS Editor to perform edits driven by those assignments. A Modeler can edit **only those assignments that have been assigned to that Modeler**).

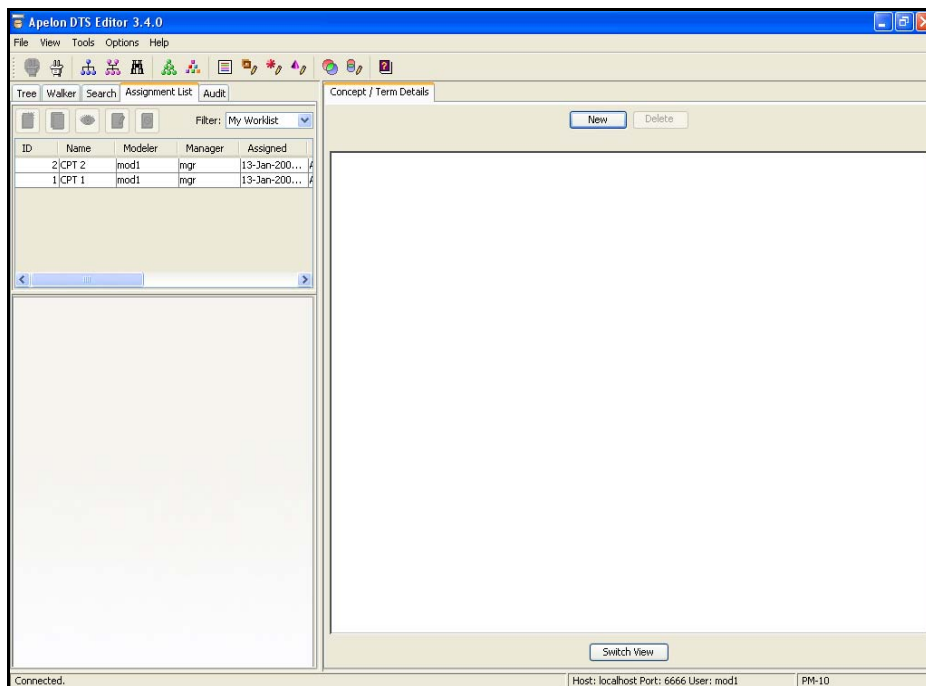
The DTS Editor Workflow functionality (i.e., Manager or Modeler) available to the login user depends on the **workflow role** assigned to the user. Refer to the [Assign Workflow Role to User](#) discussion earlier in the guide. Each DTS user also must have edit permissions established for the namespaces in which the edits will be performed. Refer to the [Create User/Assign Namespace Permissions](#) discussion earlier in the guide.

The following discussions pertain to functions available to a user with a DTS **Modeler** login. Since a Workflow Manager also can perform these functions acting in the role of a Modeler, the discussions in this section are included in this guide to reference DTS Workflow from the Modeler's perspective. The Modeler can follow these procedures to review assignments and perform edits.

View Modeler Assignments

Follow this procedure to list assignments for the login Modeler (or a login Manager acting in the role of a Modeler) and to display details for a specific assignment.

1. Click the *Assignment List* tab on the *DTS Editor Main* window. If you connected to the DTS Server with a Modeler login name, the *Assignment List* panel resembles the following.



When you click the *Assignment List* tab, the default *Assignment List* panel *Filter* is **My Worklist**. Modeler assignments that are **ASSIGNED**, **ACCEPTED**, or **REJECTED** are listed when **My Worklist** is the filter.

The following information is listed for each assignment when the *Assignment List* panel opens.

ID – The assignment ID, created automatically by DTS Workflow when the Manager created the assignment

Name – The assignment name (e.g., description) specified by the Manager on creation of the assignment

Modeler – The username of the Modeler who will review the assignment items and perform necessary edits to concepts/terms in the assignment

Manager – The current Manager of the assignment (i.e., the Manager who most recently assigned the assignment to a Modeler). This Manager can be different from the one who created the assignment.

Assigned – The date the Manager designated the assignment to the login Modeler

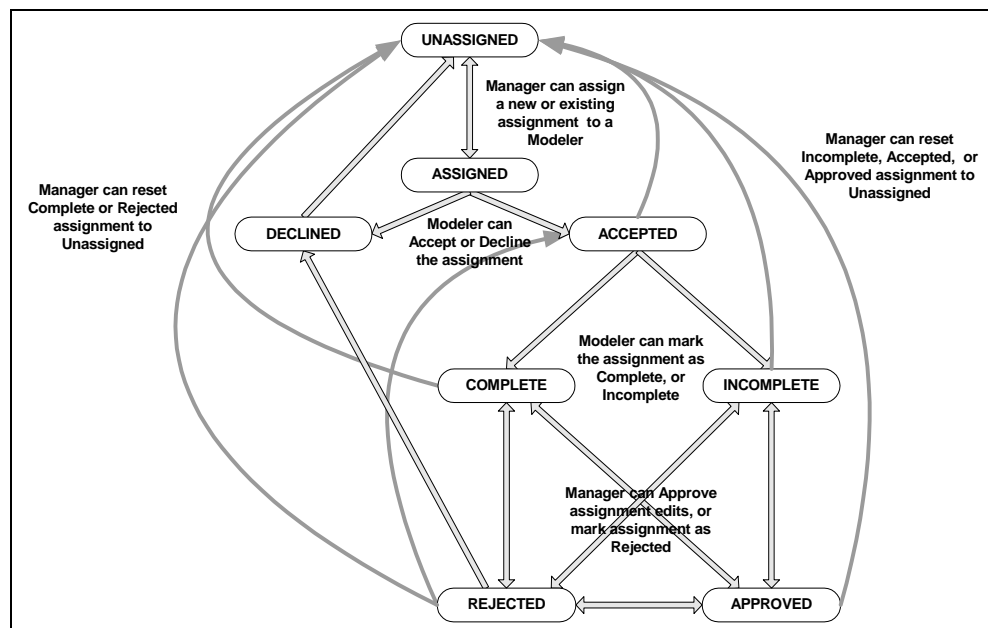
Status – The current status of the assignment

- **UNASSIGNED** – The Manager created the assignment, but did not select a Modeler to review or edit it
 - Only a Manager can create an assignment with **UNASSIGNED** status
 - Only a Manager can change an **UNASSIGNED** assignment to **ASSIGNED**
- **ASSIGNED** – The Manager selected a Modeler to review the assignment and make required edits
 - Only a Manager can change an **ASSIGNED** assignment to **UNASSIGNED**, then assign it to another Modeler
 - A Modeler can change an **ASSIGNED** status to **ACCEPTED** (to agree to perform edits) or **DECLINED** (to decline to perform edits)
- **ACCEPTED** – The Modeler has seen the assignment, and has accepted the tasks of reviewing the items within and making necessary edits
 - Only a Manager can change the **ACCEPTED** status to **UNASSIGNED**, then assign it to a different Modeler
 - A Modeler can change the **ACCEPTED** status to **COMPLETED** when all edits are finished, or to **INCOMPLETE** if only some edits could be completed

- **DECLINED** – The Modeler has seen the assignment, and has declined the task of reviewing the items within and making necessary edits. A Manager can change the **DECLINED** status to **UNASSIGNED**, then assign the assignment to another Modeler.
- **INCOMPLETE** – The Modeler has reviewed the items in the assignment and performed edits on some of them, but not all, and has marked the assignment as **incomplete**
 - Only a Manager can change an **INCOMPLETE** assignment to **UNASSIGNED**, then assign it to another Modeler
 - Only a Manager can change an **INCOMPLETE** assignment to **REJECTED** to reject the incomplete edits
 - Only a Manager can change an **INCOMPLETE** assignment to **APPROVED** to approve the edits
- **COMPLETED** – The Modeler has reviewed the items in the assignment and performed all necessary edits, and has marked the assignment as **complete**
 - Only a Manager can change a **COMPLETED** assignment to **UNASSIGNED**, then assign it to another Modeler
 - Only a Manager can change a **COMPLETED** assignment to **REJECTED** to reject the edits
 - Only a Manager can change a **COMPLETED** assignment to **APPROVED** to approve the completed edits
- **REJECTED** – The Manager has rejected the Modeler edits for a completed assignment
 - Only a Manager can change a **REJECTED** assignment to **UNASSIGNED**, then assign it to another Modeler
 - Only a Manager can change a **REJECTED** assignment to **COMPLETED** (e.g., if it was rejected accidentally)
 - Only a Manager can change a **REJECTED** assignment to **INCOMPLETE** (e.g., if it was rejected accidentally)
 - Only a Manager can change a **REJECTED** assignment to **APPROVED** to approve the completed edits
 - A Modeler can change a **REJECTED** assignment to **ACCEPTED** (to agree to perform edits) or **DECLINED** (to decline to perform edits)

- **APPROVED** – The Manager has approved the Modeler edits for a completed assignment
 - Only a Manager can change an **APPROVED** assignment to **REJECTED** (e.g., if it was approved accidentally)
 - Only a Manager can change an **APPROVED** assignment to **COMPLETED** (e.g., if it was approved accidentally)
 - Only a Manager can change an **APPROVED** assignment to **INCOMPLETE** (e.g., if it was approved accidentally)
 - Only a Manager can change an **APPROVED** assignment to **UNASSIGNED**, then assign it to another Modeler for rework

This illustration shows status edit privileges for Managers and Modelers.



Status Date – The date the assignment status last changed

Created By – The Manager who created the assignment

Created – The date the assignment was created by the Manager

Due – The date the Manager expects completion of the assignment by the designated Modeler. If the Manager did not specify a due date for the assignment, the assignment creation date is the default

Modified – The date the assignment was last modified (whether or not the assignment status changed as a result of the modification)

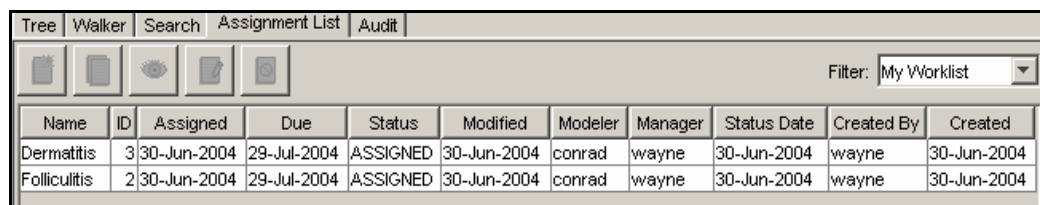
Filter Assignment List

To filter the list to view only those assignments that interest you, click the *Filter* field dropdown arrow. The filter options are listed.

- **My Worklist** - Assignments **assigned** to the Modeler that are **ASSIGNED**, **ACCEPTED**, or **REJECTED**
- **My Assignments** - Assignments **created** for the Modeler that are not **APPROVED**
- **All Approved** - All assignments with **APPROVED** status
- **All** - All assignments (no filter)

Customize Assignment List Table Layout

2. You can reposition the *Assignment List* table columns by dragging/dropping the column headers into their new positions. You also can resize each column, as needed (note the illustration).

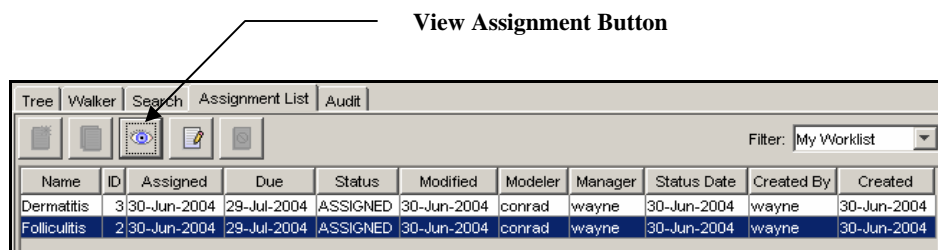


Name	ID	Assigned	Due	Status	Modified	Modeler	Manager	Status Date	Created By	Created
Dermatitis	3	30-Jun-2004	29-Jul-2004	ASSIGNED	30-Jun-2004	conrad	wayne	30-Jun-2004	wayne	30-Jun-2004
Folliculitis	2	30-Jun-2004	29-Jul-2004	ASSIGNED	30-Jun-2004	conrad	wayne	30-Jun-2004	wayne	30-Jun-2004

You can resort the table data by clicking the desired (sort) header once. The **first click** sorts the table in ascending order; the **second click** sorts in descending order. Click the column header a third time to remove the sort. Establish a secondary sort by pressing the **Control** key, then clicking the secondary column.

View Assignment Detail

3. In the assignment list, click the assignment to highlight it, then click the **View Assignment** button in the *Assignment List* panel toolbar.



The lower portion of the panel displays details for the assignment you selected.

Name: Folliculitis							
Due Date: 29-Jul-2004	Created: 30-Jun-2004						
Assigned To: conrad	Assigned By: wayne						
Status: ASSIGNED							
<div>Details</div> <div>Notes</div>							
Complete	Type	Name	ID	Code	Namespace	Added By	Notes
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne	

Close

View Assignment #2

The tab at the bottom of the *Assignment List* panel indicates the number of the assignment, and also that the assignment is in **View** mode.

None of the assignment detail is editable in View mode (all fields are disabled for edit). Click the [Edit Assignment](#) button to perform edits on the selected concept.

The following assignment detail is listed in View mode.

- **Name** – A brief description of the assignment, entered by the Manager when the assignment was created, or modified subsequently by a Manager
 - **Due Date** – The expected completion date for the assignment, entered by the Manager when the assignment was created, or modified subsequently by a Manager
 - **Assigned To** – The DTS user (i.e., Modeler or Manager) to whom the Manager issued this assignment either when the assignment was created, or when the assignment was modified subsequently by a Manager
 - **Status** – The current [status](#) of the assignment
 - **Created** – The date the Manager created the assignment
 - **Assigned By** – The Manager who specified the assignment Modeler (this can be a Manager other than the one who created the assignment)
4. Ensure the *Details* tab is selected to display assignment detail information. Assignment items are listed in table format in the lower portion of the panel.

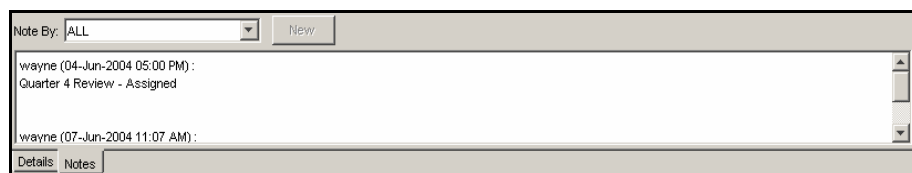
The following detail is included for each concept/term item in the assignment.

- **Complete** – If the checkbox is checked, it indicates that a Modeler has reviewed this individual item, completed necessary edits, and marked the individual item as **COMPLETE**
- **Type** – The type of namespace item for review and/or edit by the Modeler, **Concept** or **Term**
- **Name** – The name of the concept or term the Manager selected for Modeler review or edit
- **ID** – The concept or term ID
- **Code** – The concept or term code
- **Namespace** – The namespace from which the Manager selected the concept or term to be reviewed/edited; concepts/terms from multiple namespaces can be included in the same assignment. Assignment edits to subscription namespaces are written to the local namespace selected by the Modeler in the DTS Editor.
- **Added By** – The Manager who added the concept/term item (this can be a Manager other than the one who created the assignment)
- **Notes** – The Manager can enter a note (e.g., review or edit instructions) for each individual concept/term item in the assignment when the assignment is created; any Manager can enter notes for individual items during subsequent edit of the assignment

You can resort the item data by clicking the desired (sort) header once. The **first click** sorts the table in ascending order; the **second click** sorts in descending order. Click the column header a third time to remove the sort. Establish a secondary sort by pressing the **Control** key, then clicking the secondary column.

5. The Manager who creates the assignment has the option to create notes regarding the assignment. Any Manager also may enter additional notes after the assignment is created (i.e., when the assignment is opened in [Edit](#) mode). In addition, the Modeler to whom the assignment is assigned also can add notes.

To view notes related to the entire assignment, click the *Notes* tab. All notes entered for the assignment are listed in the notes display area.



The screenshot shows a software interface for viewing notes. At the top, there is a 'Note By:' dropdown menu set to 'ALL' and a 'New' button. Below this is a list of notes. The first note is from 'wayne (04-Jun-2004 05:00 PM):' with the text 'Quarter 4 Review - Assigned'. The second note is from 'wayne (07-Jun-2004 11:07 AM):'. At the bottom, there are two tabs: 'Details' and 'Notes', with 'Notes' being the active tab.

In addition to the note text, each note includes the date and time the note was created. You can restrict the display to a single note for the assignment by selecting the username and time stamp for the note from the *Note By* field dropdown list.

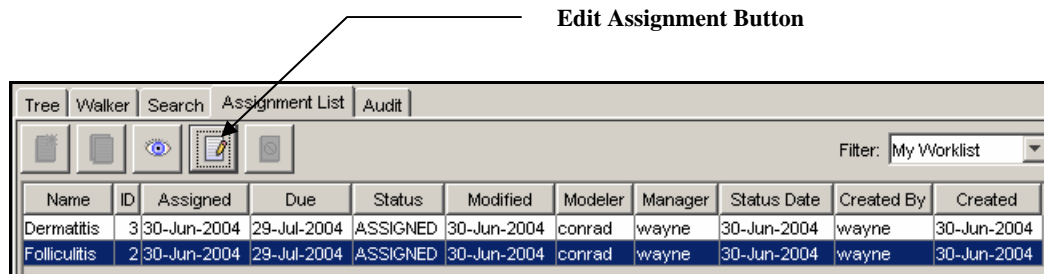
6. Click the *Details* tab to redisplay the assignment detail.
7. Click **Close** to close the detail portion of the *Assignment List* panel.
This indicator tab (**View Assignment #nn**) remains displayed in the bottom portion of the window until you close the assignment view.

At this point you can select another assignment from the *Assignment List* panel table, or click any other indicator tab (**View Assignment**, **Edit Assignment**, etc.) at the bottom of the display to resume that function.

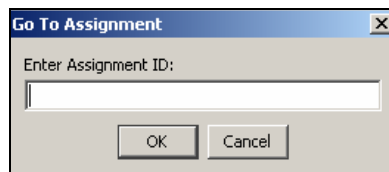
Perform Edits From Modeler Assignments

Follow this procedure to view the concept/term on an assignment line item, and perform any necessary edits for the concept/term.

1. In the assignment list, double-click the assignment for which you want to view details and perform edits. Or, click the assignment to highlight it, then click the **Edit Assignment** button in the *Assignment List* panel toolbar.



An alternate method for opening the assignment in **Edit** mode is to select **Go To Assignment** from the **Tools** menu (**Note**: if the assignment is **APPROVED**, it will open in **View** mode). The following window displays.



Enter the number of the assignment you want to edit, then click **OK**. The lower portion of the panel displays details for the assignment you selected.

Name: Folliculitis							
Due Date: 29-Jul-2004	Created: 30-Jun-2004						
Assigned To: conrad	Assigned By: wayne						
Status: ASSIGNED							
<div>Details</div> <div>Notes</div>							
Complete	Type	Name	ID	Code	Namespace	Added By	Notes
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne	
<div>OK</div> <div>Cancel</div> <div>Apply</div>							
Edit Assignment #2							

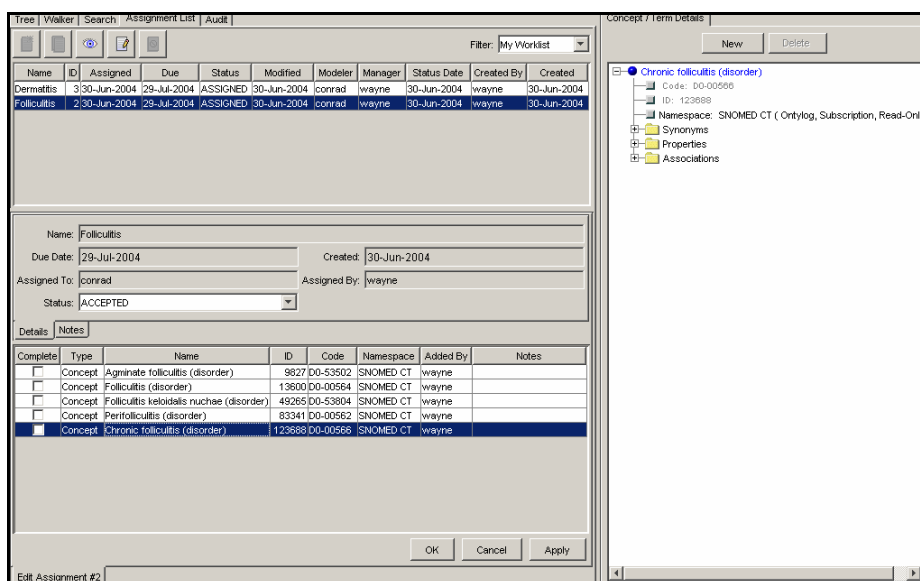
The tab at the bottom of the *Assignment List* panel indicates the number of the assignment, and also that the assignment is in **Edit** mode. In the detail portion of the panel, the *Name*, *Due Date*, and *Status* of the assignment are listed. Also listed is the date the assignment was *Created*, as well as the Manager who created the assignment (in the *Assigned By* field). These fields are for reference only.

2. From the *Status* field dropdown list, select **ACCEPTED**. You should change the assignment status from **ASSIGNED** to **ACCEPTED** before you perform edits.
3. Select a concept or term from one of the line items, then drop the concept into the *Concept/Term Details* panel. To enable the Click to Edit feature, right-click anywhere on the individual item, then select **Click to Edit** from the listed options.

Mark Complete
Mark Incomplete
Delete
Add New Concept/Term
✓ Click To Edit
Multiple Selection

As long as **Click to Edit** is enabled, any concept or term you click in an assignment line item displays automatically in the *Concept/Term Details* panel. This eliminates the need to drag the selected concept to the *Concept/Term Details* panel for view or edit.

After you select a concept or term from one of the line assignment line items, details for the selected concept/term display in the *Concept/Term Details* panel.



- At this point you can use the standard view and edit capabilities in the DTS Editor to perform the required concept/term changes in the *Concept/Term Details* panel. Edits you make to a subscription (i.e., non-editable) namespace will be reflected in the **local namespace** that is current at the time the subscription edit is made. Refer to the *Set Current Local Namespace* and *Concept Maintenance* discussions in the *DTS Editor Users Guide* for procedures on editing concepts and terms.
- If edits are completed for an individual assignment item, you can update the status of each individual item in the assignment item table as **COMPLETE**. Click the **Apply** button to update the assignment as **ACCEPTED**, then click the *Complete* checkbox for the assignment item.

Details		Notes						
Complete	Type	Name	ID	Code	Namespace	Added By	Notes	
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne		
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne		
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne		
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne		
<input checked="" type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne		

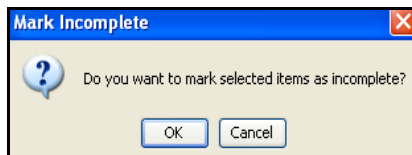
You also can right-click anywhere on the individual item, then click **Mark Complete** when the resulting options display to update the item status as **COMPLETE**. A check mark is inserted in the *Complete* checkbox.

Details		Notes						
Complete	Type	Name	ID	Code	Namespace	Added By	Notes	
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne		
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne		
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne		
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne		
<input checked="" type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne		

Multiple Selection Feature

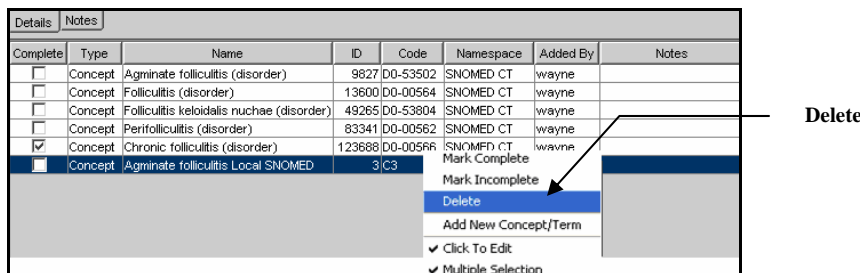
If the **Multiple Selection** feature is enabled, you can select multiple lines for update to **COMPLETE** status. A check mark is inserted in the *Complete* checkbox for each of the selected items.

If one or more completed assignment items require additional review or edit, click **Mark Incomplete** for the highlighted items. If the **Multiple Selection** feature is enabled, use the standard *Windows* selection procedures to select and highlight the lines. The following window displays.

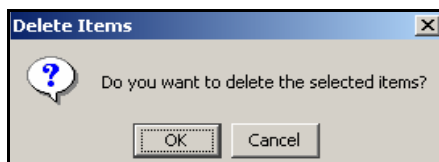


Click **OK**. The check mark is removed from the *Complete* checkbox for the selected item(s). Note that you can update the status of the entire assignment as **COMPLETED**, even if one or more of the individual line items is marked **Incomplete**.

6. A Modeler can delete only items that he/she has added (not items assigned by a Manager). To delete one or more items (whether marked as completed or not) with **Multiple Selection** enabled, use the standard *Windows* selection procedures to select and highlight the desired lines, then right-click on one of the lines.

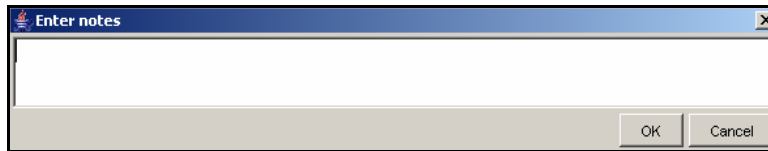


Click **Delete** when the options list displays (the **Delete** option is disabled if the item was not added by the Modeler). The following window displays



Click **OK** to confirm deletion of the item(s) from the assignment.

7. You have the option to create notes regarding the entire assignment. Click the *Notes* tab, then click the **New** button that displays subsequently. The *Enter Notes* window displays.



A small dialog box titled "Enter notes" with a text area for input and "OK" and "Cancel" buttons at the bottom right.

Enter the new note you want associated with the assignment, then click **OK**. The new note is listed in the display area on the *Notes* tab.

Click the *Details* tab to redisplay the assignment detail information.

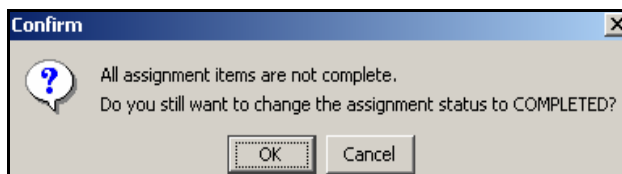
8. You also can enter note text for **each individual concept/term item** in the assignment (e.g., details regarding the edits performed). To enter note text for a line item, enter the desired text in the *Notes* column field on the desired line.

Details Notes							
Complete	Type	Name	ID	Code	Namespace	Added By	Notes
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne	
<input checked="" type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne	Add REVIEWED prop type

Update Assignment as Complete or Incomplete

9. Click **Apply** to update the (entire) assignment with your edits, and leave the *Detail* tab section of the *Assignment List* panel open for further review and edit. Your edits up to the moment are reflected for the assignment in the assignments list on the panel.
10. From the *Status* field dropdown list, select **COMPLETE**. This indicates to the Workflow Manager that all possible reviews and edits of the assignment line items have been completed.

Note that you can update the status of the entire assignment as **COMPLETED**, even if one or more of the individual line items is not marked as **Complete**. The following confirmation window displays.



A confirmation dialog box titled "Confirm" with a question mark icon. The text inside says: "All assignment items are not complete. Do you still want to change the assignment status to COMPLETED?". There are "OK" and "Cancel" buttons at the bottom.

Click **OK** to update the assignment status as **COMPLETED**. Select **INCOMPLETE** to indicate to the Workflow Manager that you reviewed the assignment (and possibly made edits) but that the assignment may need further review and additional edits. You can update the status of the entire assignment as **INCOMPLETE**, even if all of the individual line items are marked as **Complete**.

Click **OK** to update the assignment with your status edit, and to close the *Detail* tab section of the *Assignment List* panel. The tab at the bottom of the *Assignment List* panel indicating that the assignment is in **Edit** mode is removed.

Your assignment edits are reflected in the assignments list table in the panel. Note that you can click the **Refresh Assignment List** option in the **Tools** menu at any time to update the assignment list table.

Add New Concepts/Terms to an Assignment

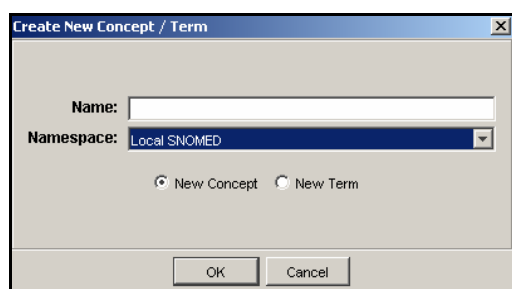
An assignment may require that you create one or more new concepts or terms. You create new concepts/terms using the standard procedure in the DTS Editor *Concept/Term Details* panel. You have the option to add each new concept/term as an assignment item. This provides an audit trail of the creation of the concept/term in the database.

You have two options for adding a new concept/term to an assignment. The first option allows you to add each new concept/term as an assignment item as you create it. The other option allows you to view all new concepts/terms created by you (for all assignments) then select the concepts/terms to add as assignment items.

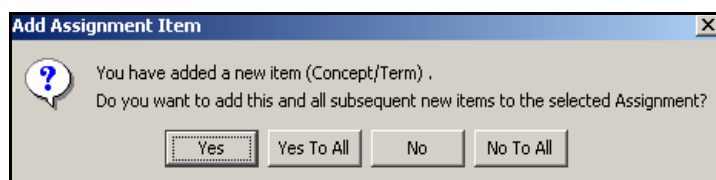
Add New Concepts/Terms as You Create Them

Follow this procedure to selectively accept or decline addition of new concepts/terms as assignment items.

1. Select the assignment for which you want to add new concepts/terms.
2. After you click **New** in the *Concept/Term Details* panel, you are prompted to specify the new concept/term *Name*.

A dialog box titled "Create New Concept / Term" with a close button (X) in the top right corner. It contains a "Name:" text input field, a "Namespace:" dropdown menu currently showing "Local SNOMED", and two radio buttons: "New Concept" (selected) and "New Term". At the bottom are "OK" and "Cancel" buttons.

Specify the concept/term name, then click **OK**. The *Add Assignment Item* window displays.

A dialog box titled "Add Assignment Item" with a close button (X) in the top right corner. It features a question mark icon and the text: "You have added a new item (Concept/Term) . Do you want to add this and all subsequent new items to the selected Assignment?". At the bottom are four buttons: "Yes", "Yes To All", "No", and "No To All".

You have four options for adding to the assignment the concept/term you are creating currently, as well as any concepts/terms you create subsequently.

3. Click the desired option for adding new concepts/terms to this specific assignment. If you select another assignment and attempt to add new concepts/terms, you are prompted again for parameters to add new the concepts/terms as assignment items.
 - Click **Yes** to add this new concept/term as an assignment item. The *Add Assignment Item* window displays for each subsequent concept/term you create for this assignment; this allows you to selectively add a new concept/term as you create it, or decline the addition.
 - Click **Yes To All** to add this new concept/term, and all subsequent concepts/terms you create, as assignment items. The *Add Assignment Item* window does **not** display for each new concept/term you create for the current assignment (i.e., additional concepts/terms are added as assignment items **without confirmation** of each added item).
 - Click **No** if this **specific new concept/term** should **not** be added as an assignment item. The *Add Assignment Item* window displays for each subsequent new concept/term you create for this assignment; this allows you to selectively add a new concept/term as you create it, or decline the addition.
 - Click **No To All** to decline addition of this new concept/term, and all subsequent concepts/terms you create, as assignment items. The *Add Assignment Item* window does **not** display for each new concept/term you create for the current assignment (i.e., additional concepts/terms are **not** added as assignment items, and no confirmation is requested).

Based on your option selection for adding new assignment items for new concepts/terms, the *Assignment List* panel items detail is updated. Note the three new items in the bottom of the table, each referencing a new concept added to a local **Namespace** by the Modeler (under **Added By**).

Complete	Type	Name	ID	Code	Namespace	Added By	Notes
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne	
<input checked="" type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Chronic folliculitis Local SNOMED	1	C1	Local SNOMED	conrad	
<input type="checkbox"/>	Concept	Folliculitis Local SNOMED	2	C2	Local SNOMED	conrad	
<input type="checkbox"/>	Concept	Agminate folliculitis Local SNOMED	3	C3	Local SNOMED	conrad	

Select New Concepts/Terms From Across Assignments After You Create Them

Follow this procedure to select one or more new concepts/terms to add to an assignment after you complete creation of those concepts/terms. All new concepts/terms created by you, for all assignments, are available for selection and addition to the current assignment.

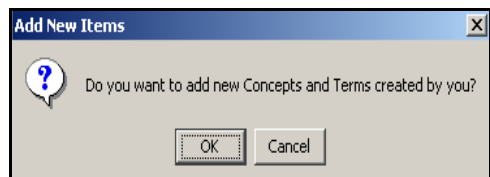
1. Add new concepts/terms for assignments using the standard DTS Editor *Concept/Term Details* panel procedures.
2. Right click in the *Assignment List* panel items table. From the displayed options, select **Add New Concept/Term**.

Complete	Type	Name	ID	Code	Namespace	Added By	Notes
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOM		
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOM		
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOM		
<input checked="" type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOM		

Mark Complete
Mark Incomplete
Delete
Add New Concept/Term
Click To Edit
Multiple Selection

Add New Concept/
Term

3. The following window displays.



Click **OK** if you want to select concepts/terms you have created for addition to this assignment.

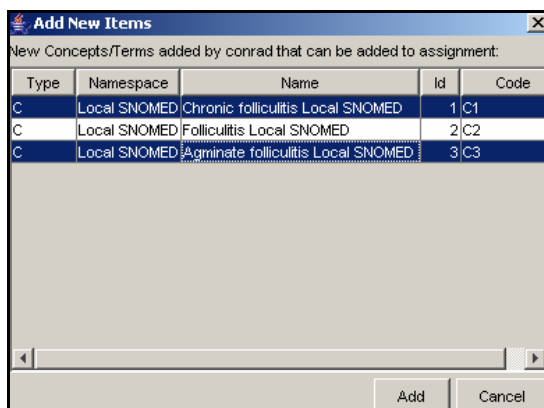
The *Add New Items* window displays, listing all concepts/terms created by you.

Add New Items				
New Concepts/Terms added by conrad that can be added to assignment:				
Type	Namespace	Name	Id	Code
C	Local SNOMED	Chronic folliculitis Local SNOMED	1	C1
C	Local SNOMED	Folliculitis Local SNOMED	2	C2
C	Local SNOMED	Agminate folliculitis Local SNOMED	3	C3

AddCancel

You can resize the *Add New Item* panel as desired. You also can resize and reposition the columns in the table; these sizing and positioning parameters are retained for future sessions.

4. When you have determined which concepts/terms to select, use standard *Windows* selection procedures to highlight the lines, then click **Add**.



The concepts/terms you selected are added to the *Assignment List* panel items detail. Note the two new items in the bottom of the table, each referencing a new concept added (in this case, to a local namespace).

Complete	Type	Name	ID	Code	Namespace	Added By	Notes
<input type="checkbox"/>	Concept	Agminate folliculitis (disorder)	9827	D0-53502	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis (disorder)	13600	D0-00564	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Folliculitis keloidalis nuchae (disorder)	49265	D0-53804	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Perifolliculitis (disorder)	83341	D0-00562	SNOMED CT	wayne	
<input checked="" type="checkbox"/>	Concept	Chronic folliculitis (disorder)	123688	D0-00566	SNOMED CT	wayne	
<input type="checkbox"/>	Concept	Chronic folliculitis Local SNOMED	1	C1	Local SNOMED	conrad	
<input type="checkbox"/>	Concept	Agminate folliculitis Local SNOMED	3	C3	Local SNOMED	conrad	

Audit Queries

When a Modeler or Manager edits a concept or term in a namespace (edits driven by one or more assignments) an audit history is created for the concept/term. The DTS Workflow application includes an **Audit Query** feature that allows Modelers and Managers to search the audit history for these edits. A series of search filters allows you to specify which edit transactions should be returned from each query.

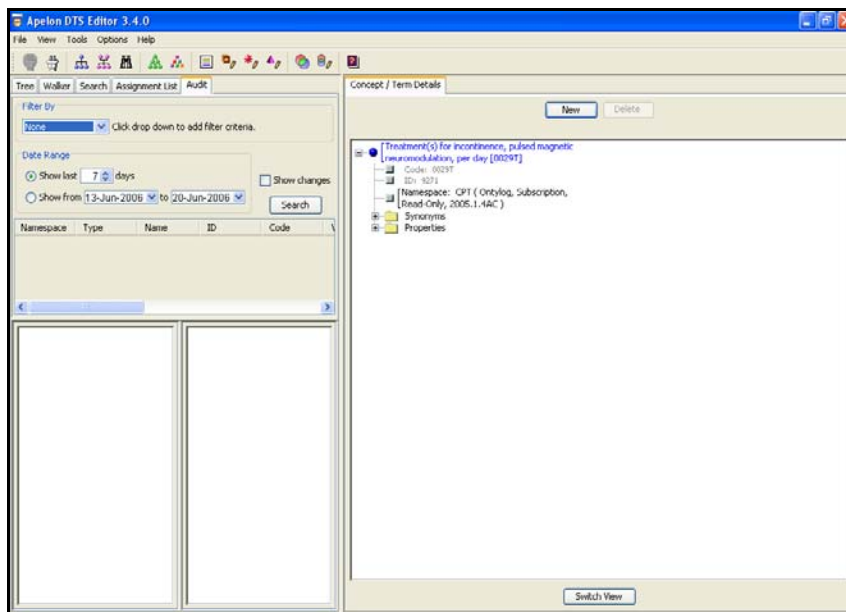
Multiple versions of a concept/term result if edits were performed at different times, and the concept/term edits were saved more than once. If the audit history search returns multiple concept/term versions, you can compare the details of each version. This may help you to determine if all edits were appropriate, and if additional edits are needed.

For Workflow Managers (only) DTS Workflow also provides an audit history for each **assignment**. The history is created when the assignment is created, and then is updated when the assignment status changes.

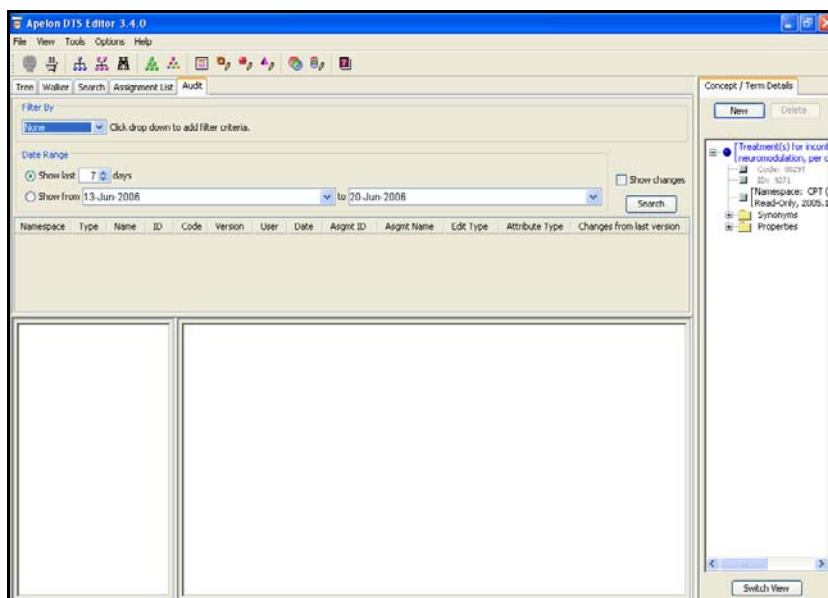
Search Audit History for Concept/Term Edits

Follow this procedure to enter criteria by which to search for concept/term edits that were driven by assignments.

1. Select **Audit** from the *DTS Editor Main* window tab options. The *Audit* panel displays as illustrated.

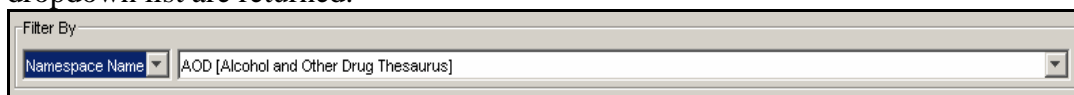


You can resize the *Audit* panel, as desired. Note the illustration.

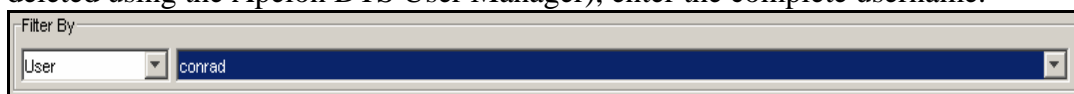


2. You have the option of filtering history items returned from the query. Select the value by which to filter the query from the *Filter By* field dropdown list (use the default, **None**, if you do not want results filtered). Each filter option is discussed.

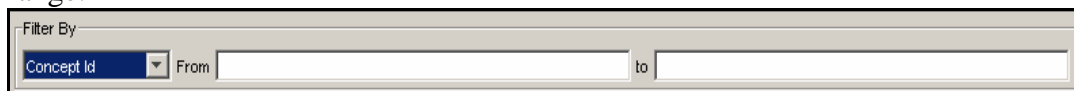
Namespace Name – Only edits from the namespace you select from the dropdown list are returned.



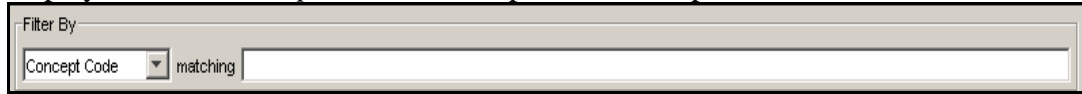
User – Only edits performed by the user you select from the dropdown list are returned. Only active users are listed; to search for an inactive user (i.e., a user deleted using the Apelon DTS User Manager), enter the complete username.



Concept Id – Only edits for concepts with IDs in the range you specify are returned. Specify the opening and closing ends of the search range in the *From* and *to* fields, respectively. You can drag an ID for a concept displayed in the *Concept/Term Details* panel, and drop it as either of the concept IDs in the search range.

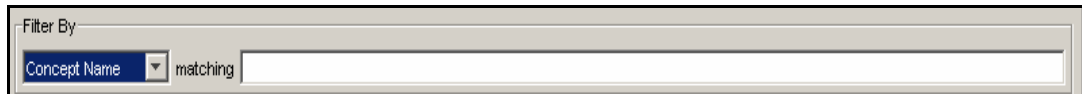


Concept Code – Only edits for the concept with a (case-insensitive) code that matches the one you specify are returned. Note that you may use wildcards (*) in your concept code search string. You also can drag the code from a concept displayed in the *Concept/Term Details* panel, and drop it as the code for search.



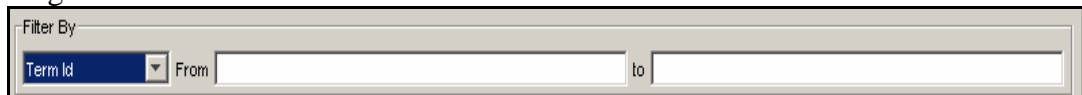
The screenshot shows a 'Filter By' dropdown menu. The 'Concept Code' option is selected, and the operator 'matching' is displayed next to it. A text input field is visible to the right of the operator.

Concept Name – Only edits for the concept with a (case-insensitive) name that matches the one you specify are returned. Note that you may use wildcards (*) in your concept name search string. You also can drag the name for a concept displayed in the *Concept/Term Details* panel, or another displayed panel, and drop it as the name for search



The screenshot shows a 'Filter By' dropdown menu. The 'Concept Name' option is selected, and the operator 'matching' is displayed next to it. A text input field is visible to the right of the operator.

Term Id – Only edits for terms with IDs in the range you specify are returned. Specify the opening and closing ends of the search range in the *From* and *to* fields, respectively. You can drag an ID for a term displayed in the *Concept/Term Details* panel, and drop it as either of the term IDs in the search range.



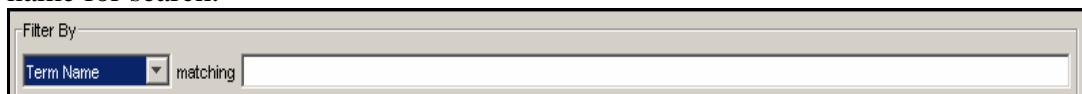
The screenshot shows a 'Filter By' dropdown menu. The 'Term Id' option is selected, and the operators 'From' and 'to' are displayed next to it. Two text input fields are visible to the right of the operators.

Term Code – Only edits for the term with a (case-insensitive) code that matches the one you specify are returned. Note that you may use wildcards (*) in your term code search string. You also can drag a code from a term displayed in the *Concept/Term Details* panel, and drop it as the term code for search.



The screenshot shows a 'Filter By' dropdown menu. The 'Term Code' option is selected, and the operator 'matching' is displayed next to it. A text input field is visible to the right of the operator.

Term Name – Only edits for the term with a (case-insensitive) name that matches the one you specify are returned. Note that you may use wildcards (*) in your term name search string. You also can drag the name for a term displayed in the *Concept/Term Details* panel, or another displayed panel, and drop it as the term name for search.



The screenshot shows a 'Filter By' dropdown menu. The 'Term Name' option is selected, and the operator 'matching' is displayed next to it. A text input field is visible to the right of the operator.

Filter By: Assignment Id From to

Filter By
Assignment Name matching

- Date Range
- ☒ Show last 7 days

○ Show from 24-Jun-2004 to 01-Jul-2004

Date Range

☐ Show last 7 days

☒ Show from 24-Jun-2004 to 01-Jul-2004

Namespace: June 2004

Code	Version	User	Date	Asgmt ID	Asgmt Name	Edit Type
<div> <div>Mo Tu We Th Fr Sa Su</div> <div> <div>1 2 3 4 5 6</div> <div>7 8 9 10 11 12 13</div> <div>14 15 16 17 18 19 20</div> <div>21 22 23 24 25 26 27</div> <div>28 29 30</div> </div> </div>						

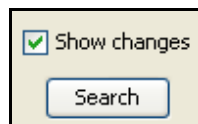
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After you enter all parameters, click **Search**. Audit history entries that meet your search criteria are retrieved and listed in table format.

The following column data displays. You can resize and reposition the columns in the table.

- **Namespace** - The namespace in which the edit occurred
- **Type** - The type is **Concept** or **Term**
- **Name** - The name of the concept or term
- **ID** - The concept or term ID
- **Code** - The concept or term code
- **Version** - Each time a concept/term is edited and saved, that version of the concept/term is saved to a table in the database. If edits to a concept/term are saved multiple times, this results in multiple versions of the concept/term. Each version is listed in the table (provided it meets your search criteria). Refer to the [Viewing Concept/Term Versions](#) discussion for instructions on viewing different versions.
- **User** - The user who performed the edit
- **Date** - The date and time the edit occurred
- **Asgmt ID** - The ID of the assignment for which the edit occurred. In the illustration, the first **three** concept edits listed do not reference an assignment ID, indicating that these edits were not driven by assignments (i.e., they were unassigned edits). Each remaining listed edit references an assignment ID, indicating that each was driven by an assignment.

- **Asgmt Named** - The name of the assignment for which the edit occurred. In the illustration, the first **three** concept edits listed do not reference an assignment name, indicating that these edits were not driven by assignments (i.e., they were unassigned edits). Each remaining listed edit references an assignment name, indicating that each was driven by an assignment.
- **Edit Type** - The type of edit that occurred, **Add**, **Update**, or **Delete**
- **Attribute Type** - The attribute (e.g., Property, Association, etc.) that was added, updated, or deleted
- **Changes From Last Version** - If you check the *Show Changes* field checkbox, the **Changes From Last Version** column indicates the edit that was made to the previous version of the concept or term (i.e., the difference between the two versions is noted).



This feature is useful when assignment edits result in concept changes to associations; changes are listed for all concepts affected by the assignment edit (both target and source concepts).

The feature also is useful when assignment edits result in multiple saved edits to a concept or term, producing multiple versions of the concept or term. Viewing the change referenced in the **Changes From Last Version column** from the previous version may help you to select the version of the concept or term for which you want to see details. Refer to the *Viewing Concept/Term Versions* discussion (which follows this discussion) for more on viewing details from multiple versions.

Viewing Concept/Term Versions

If assignment edits to a concept/term were saved more than once, this results in multiple versions of the concept/term. You can view the details of each specific version of the concept/term, which may help you determine if an edit from a previous version is preferable to the current concept/term version.

1. Click **Search** on the *Audit* panel to retrieve audit history entries that meet your search criteria. Results are listed in the query results table; in the illustration, four versions are listed for the concept **Chronic dermatitis (disorder)**.

Namespace	Type	Name	ID	Code	Version	User	Date	Asgmt ID	Asgmt Name	Edit Type	Attribute
SNOMED CT	Concept	Chronic folliculitis (disorder)	123688	D0-00566	1	wayne	01-Jul-2...			Add	Property
SNOMED CT	Concept	Agminate folliculitis (disorder)	9827	D0-53502	1	wayne	01-Jul-2...			Add	Property
SNOMED CT	Concept	Folliculitis (disorder)	13600	D0-00564	1	wayne	01-Jul-2...			Add	Property
SNOMED CT	Concept	Contact dermatitis due to non-medicinal chemical ...	3226	D0-10250	1	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Contact dermatitis due to poison ivy (disorder)	5205	D0-10282	1	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	1	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	2	conrad	01-Jul-2...	2	Dermatitis	Delete	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	3	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	4	conrad	01-Jul-2...	2	Dermatitis	Update	Property

Version:

Version:

2. Drag each version for which you want to see details into one of the **Version** panes below the table. In the illustration, versions **2** and **4** of the concept were dragged into the detail panes. You can resize the **Version** panes, as needed.

Namespace	Type	Name	ID	Code	Version	User	Date	Asgmt ID	Asgmt Name	Edit Type	Attribute
SNOMED CT	Concept	Chronic folliculitis (disorder)	123688	D0-00566	1	wayne	01-Jul-2...			Add	Property
SNOMED CT	Concept	Agminate folliculitis (disorder)	9827	D0-53502	1	wayne	01-Jul-2...			Add	Property
SNOMED CT	Concept	Folliculitis (disorder)	13600	D0-00564	1	wayne	01-Jul-2...			Add	Property
SNOMED CT	Concept	Contact dermatitis due to non-medicinal chemical ...	3226	D0-10250	1	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Contact dermatitis due to poison ivy (disorder)	5205	D0-10282	1	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	1	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	2	conrad	01-Jul-2...	2	Dermatitis	Delete	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	3	conrad	01-Jul-2...	2	Dermatitis	Add	Property
SNOMED CT	Concept	Chronic dermatitis (disorder)	34936	D0-00016	4	conrad	01-Jul-2...	2	Dermatitis	Update	Property

Version: 3

Version: 4

Chronic dermatitis (disorder)

Code: D0-00016

ID: 34936

Namespace: SNOMED CT (Ontology, Subscription, Read-Only)

Synonyms

Properties

Code in Source: 34936007

Concept Status: Current

NHS Clinical Terms Version 3: XUCGj

Occurrence: Chronic

SNOMED Legacy-style Code: D0-00016

SNOMED_JCD9_MAP: 692.9

SNOMED_JCD9_MAP_CATEGORIZED: 692.9|2

Associations

Chronic dermatitis (disorder)

Code: D0-00016

ID: 34936

Namespace: SNOMED CT (Ontology, Subscription, Read-Only)

Synonyms

Properties

Code in Source: 34936007

Concept Status: Current

NHS Clinical Terms Version 3: XUCGj

Occurrence: Chronic Occurrence

SNOMED Legacy-style Code: D0-00016

SNOMED_JCD9_MAP: 692.9

SNOMED_JCD9_MAP_CATEGORIZED: 692.9|2

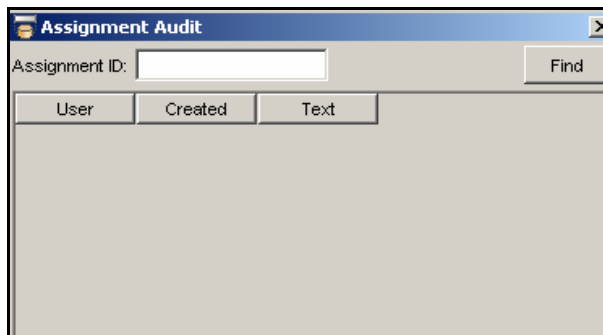
Associations

Each **Version** pane reflects the state of the concept/term as the result of an edit/update cycle.

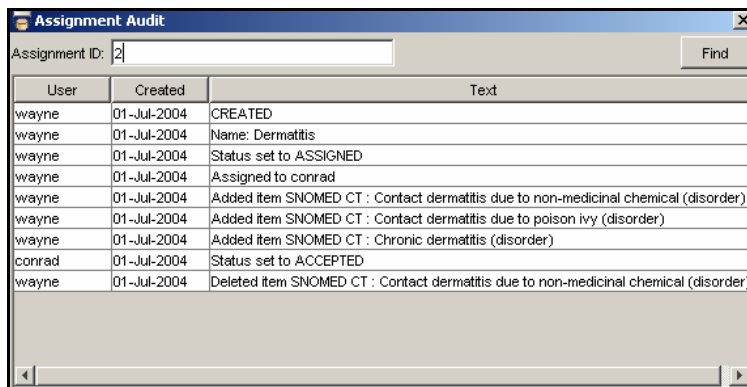
Assignment Audit Panel

As a result of viewing audit search results, you may want to see more detail regarding a specific assignment referenced in the audit results table. DTS Workflow makes available an audit history for each **assignment** (the assignment audit is available to Workflow Managers only). The history is created when the assignment is created, and is updated when the assignment status changes, and when an item is added to or deleted from the assignment.

1. Select **Assignment Audit** from the *DTS Editor Main* window **Tools** menu. The *Assignment Audit* window displays.



2. Enter the number of the assignment for which you want to review detail in the *Assignment ID* field, then click **Find**. History data for the assignment is listed in table format.



The following column data is provided.

User – The user who generated the audit history item

Created – The date the audit history item was created

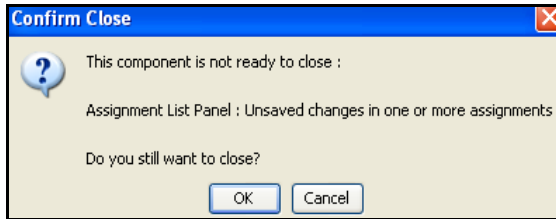
Text – A brief description of the audit item transaction. If an assignment item is added or deleted, the description references the assignment concept, as well as the namespace in which the concept/term resides.

You can resize the *Assignment Audit* panel as desired. You also can resize and reposition the columns in the table. The column position and sizing parameters are retained for future sessions.

You can resort the table data by clicking the desired (sort) header once. The **first click** sorts the table in ascending order; the **second click** sorts in descending order. Click the column header a third time to remove the sort. You can establish a secondary sort by pressing the **Control** key, then clicking the secondary sort column.

Disconnect From the DTS Editor

Select **Disconnect** from the **File** menu, or click the toolbar **Disconnect** icon. If there is unsaved data (new or modified) in one of the DTS Editor components, including one of the DTS Workflow tabs, a confirmation window similar to the following displays.



Click **Yes** to close the component and disconnect without reviewing or updating unsaved data; displayed floating panels are closed when you disconnect. Click **Cancel** to disregard the disconnect request.

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